



CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

Countries in need of
external assistance
for food

45

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 45 countries, including 33 in Africa, nine in Asia, two in Latin America and the Caribbean and one in Europe, are in need of external assistance for food. In East Africa, engendered by multi-season droughts, the food insecurity situation is grave and unless humanitarian assistance is scaled up, famine is expected in parts of Somalia. Globally, multi-year high inflation rates, amid challenging macroeconomic environments, are aggravating food insecurity conditions, particularly in low-income food-deficit countries.

Asia	-0.1
Africa	-4.4
Central America and the Caribbean	-3.2
South America	+10.7
North America	-0.3
Europe	-7.7
Oceania	-14.1
World	-1.4

World cereal production 2022 over 2021

(yearly percentage change)

-1.4%

REGIONAL HIGHLIGHTS

AFRICA Widespread and substantial rainfall deficits are foreseen to cause a decline in harvests in East Africa, notably in Somalia and parts of Ethiopia and Kenya, while inadequate water and rangeland resources have caused extensive livestock deaths. Although floods in West Africa resulted in localized crop damage, the overall abundant rainfall is expected to support a production increase in 2022. Drought and extreme weather events in parts of North Africa and Southern Africa caused reduced 2022 cereal outputs in most countries.

ASIA Cereal production in Far East Asia is forecast at a high level in 2022, buoyed by above-average prospects in the leading producing countries, China (mainland) and India. However, a macroeconomic crisis in Sri Lanka contributed to a well below-average harvest while a severe flooding compromising production in Pakistan. In the Near East, cereal harvests in the majority of countries are estimated at below-average levels due to dry weather conditions, while a near-average output is foreseen among CIS Asian countries following broadly conducive rainfall.

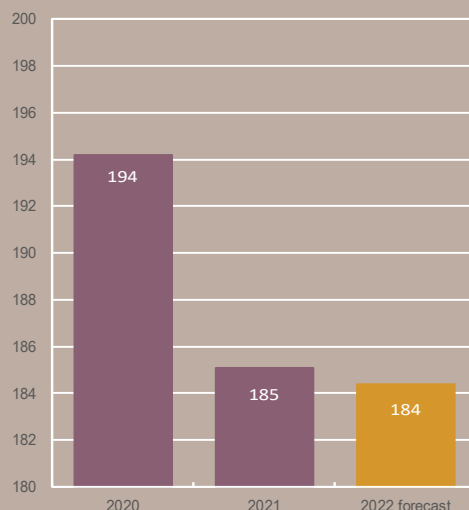
LATIN AMERICA AND THE CARIBBEAN

In South America, unfavourable rains have dampened wheat yield prospects in Argentina, the leading producer, nevertheless the overall aggregate cereal outturn in the subregion is forecast at a record high, underpinned by large maize plantings. In Central America and the Caribbean, 2022 cereal production is seen to dip below the average, while the hurricane season is still active, heightening negative risks to crops and food security.

LIFDCs cereal production
2022 over 2021

-0.4%

(million tonnes)



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COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

Note: Situation as of early September 2022
Territories/boundaries**

AFRICA (33 countries)

- Burkina Faso
- Burundi
- Cameroon
- Central African Republic
- Chad
- Congo
- Democratic Republic of Congo
- Djibouti
- Eritrea
- Eswatini
- Ethiopia
- Guinea
- Kenya
- Lesotho
- Liberia
- Libya
- Madagascar
- Malawi
- Mali
- Mauritania
- Mozambique
- Namibia
- Niger
- Nigeria
- Senegal
- Sierra Leone
- Somalia
- South Sudan
- Sudan
- Uganda
- United Republic of Tanzania
- Zambia
- Zimbabwe

ASIA (9 countries)

- Afghanistan
- Bangladesh
- Democratic People's Republic of Korea
- Lebanon
- Myanmar
- Pakistan
- Sri Lanka
- Syrian Arab Republic
- Yemen

LATIN AMERICA AND THE CARIBBEAN (2 countries)

- Haiti
- Venezuela (Bolivarian Republic of)

EUROPE (1 country)

- Ukraine

** See Terminology ([page 7](#))

Source: GIEWS, 2022. *Crop Prospects and Food Situation #3* [online]. [Cited 30 September 2022], modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

AFRICA (33 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Central African Republic

Conflict, population displacement, high food prices

- According to the latest Integrated Food Security Phase Classification (IPC) analysis, issued in April 2022, the number of people in IPC Phase 3 (Crisis) and above was estimated at 2.2 million between April and August 2022, mainly due to the impact of civil insecurity and high food prices.
- As of 31 July 2022, about 648 000 people were internally displaced and over 735 000 refugees were hosted in neighbouring countries, mostly Cameroon, the Democratic Republic of the Congo and Chad.

Kenya

Drought conditions

- About 4.4 million people are projected to be severely acutely food insecure between October and December 2022 reflecting consecutive poor rainy seasons since late 2020 that affected crop and livestock production, mainly in northern and eastern pastoral, agropastoral and marginal agricultural areas.

Niger

Conflict, shortfall in cereal production

- According to the latest Cadre Harmonisé (CH) analysis, about 4.4 million people were estimated to need humanitarian food assistance between June and August 2022, reflecting worsening conflicts, a poor cereal output in 2021 and higher year-on-year prices of food.
- As of August 2022, civil conflict has displaced nearly 350 000 people, mostly in Diffa, Tahoua and Tillabery regions. Furthermore, the country hosts about 295 000 refugees, mainly from Nigeria and Mali.
- Since the beginning of the rainy season that started in June, heavy rainfall has caused widespread flooding, affecting about 250 000 people across the country and aggravating food insecurity conditions.

Somalia

Drought conditions, civil insecurity

- An estimated 6.7 million people are expected to face severe acute food insecurity between October and December 2022, including about 300 000 people facing IPC Phase 5 (Catastrophe) levels of food insecurity, as a result of consecutive poor rainy seasons since late 2020, which severely affected crop and livestock production, and due to heightened conflict since early 2021.

- Famine is expected to occur in Baidoa and Burhakaba districts of Bay region between October and December if humanitarian assistance is not urgently scaled up.

WIDESPREAD LACK OF ACCESS

Burundi

Weather extremes, high food prices

- About 646 000 people are estimated to be facing acute food insecurity (IPC Phase 3 [Crisis]) between June and September 2022. The main drivers are poor rains in May in some central and southern eastern areas that affected pulses production, the lingering socioeconomic impact of the COVID-19 pandemic and high food prices due to elevated fuel prices inflating transportation costs.

Chad

Civil insecurity, shortfall in cereal production

- According to the latest CH analysis, about 2.1 million people were estimated to face acute food insecurity (CH Phase 3 [Crisis] and above), between June and August 2022 due to persisting insecurity in Lac and Tibesti regions and a below-average cereal production in 2021.
- About 380 000 people were displaced due to insecurity in Lake Chad Region as of August 2022. Furthermore, about 570 000 refugees mostly from the Sudan, the Central African Republic, Cameroon and Nigeria, reside in the country due to conflicts and require humanitarian assistance.
- As of September, floods destroyed about 45 000 hectares of crops and affected more than 450 000 people, mostly in the provinces of Logone Occidental, Mandoul and Sila, increasing the risk of a deterioration of food insecurity.

Democratic Republic of the Congo

Civil insecurity in eastern areas, economic downturn, high food prices

- According to the November 2021 IPC analysis, 26 million people were projected to experience acute food insecurity (IPC Phase 3 [Crisis] or above) between January and June 2022. This is due to persisting conflict in eastern provinces of North Kivu, South Kivu and Ituri, which continues to cause displacements, coupled with the lingering economic repercussions of the COVID-19 pandemic. The elevated staple food prices pose a further risk to food insecurity.

- As of 31 August 2022, over 1 million Congolese refugees were hosted in several neighbouring countries, including 446 000 in Uganda.

Djibouti

Unfavourable weather, high food prices

- About 192 000 people are estimated to be experiencing acute food insecurity (IPC Phase 3 [Crisis] and above) between July and December 2022 mainly due to the impact of insufficient rains in 2021 and 2022 that affected rangelands and pastoral livelihoods, and high food prices.

Eritrea

Macroeconomic challenges have increased the population's vulnerability to food insecurity

Ethiopia

Conflict in the region of Tigray, drought conditions in southeastern areas, high food prices

- According to the 2022 Humanitarian Response Plan, 20.4 million people are officially estimated to be facing acute food insecurity.
- In conflict-affected northern Tigray, Amhara and Afar regions, out of the total national figure, 13 million people are facing severe acute food insecurity due to the impact of the conflict on livelihoods.
- Drought conditions that began in late 2020 are affecting millions of people in southern South West, SNNP and Somali regions and in southern Borena zone of Oromia region; in the region of Somali alone, the worst affected area, 4.1 million people are estimated to be severely food insecure.

Malawi

Localized shortfalls in cereal production, high food prices

- An estimated 3.82 million people are expected to experience acute food insecurity (IPC Phase 3 [Crisis]) between October 2022 and March 2023. This number is more than double the estimate for the January to March 2022 period.
- The deterioration in food insecurity outcomes reflects the impact of weather-induced localized shortfalls in cereal production in 2022, particularly in southern districts, and high food prices that have constrained households' economic access to food.

Nigeria

Conflict in northern areas, localized shortfalls in cereal production, high food prices

- According to the latest CH analysis, about 19.45 million people were estimated to be in need of humanitarian food assistance between June and August 2022, including 1.18 million in CH Phase 4 (Emergency), owing to the deterioration of security conditions and conflicts in northern states, localized shortfalls in staple food production, high food prices and reduced incomes.
- As of March 2022 (last data available), about 3.16 million people were estimated to be internally displaced in northern states.
- As of September 2022, the flood affected about 190 000 people in areas already impacted by high levels of food insecurity, malnutrition and violence in northeastern states.

South Sudan

Economic downturn, floods, civil insecurity

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population, driven rampant food and non-food inflation, insufficient food supplies due to a stagnant agricultural production, livelihood losses owing to consecutive years with widespread floods and the escalation of organized violence at subnational level since 2020. About 7.74 million people, approximately 63 percent of the total population, were estimated to be facing acute food insecurity during the lean season between April and July 2022.
- Particular concern exists for households in Jonglei, Lakes and Unity states, where 60 to 80 percent of the population are estimated to be severely food insecure, with a total of 87 000 people facing IPC Phase 5 (Catastrophe) levels of food insecurity.

Zimbabwe

High food prices

- Based on a government assessment, an estimated 3.8 million people are expected to be in need of humanitarian assistance between January and March 2023. This number is higher than the level estimated in the first quarter of 2022.

- The downturn in food security conditions is largely on account of poor food access due to prevailing high food prices and reduced incomes owing to the effects of an economic downturn. A decline in cereal production in 2022 has also aggravated conditions.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Civil insecurity in the north, shortfall in cereal production, high food prices

- According to the latest CH analysis, 3.45 million people were estimated to be acutely food insecure and in need of humanitarian assistance between June and August 2022, of which 628 000 are in CH Phase 4 (Emergency). In Centre-Nord and Sahel regions, insecurity continued to cause population displacements and as of April 2022 (latest data available) about 1.9 million people had been displaced and required assistance. In addition, nearly 28 000 refugees, mostly from Mali, are residing in Sahel Region.
- Reduced cereal production in 2021 and abnormally high prices of food are further factors aggravating food insecurity.

Cameroon

Civil insecurity, high food prices

- According to the March 2022 CH analysis, about 2.4 million people were projected to be acutely food insecure, CH Phase 3 (Crisis) and above, between June and August 2022, resulting from the effects of conflict, sociopolitical unrest and high food prices.
- As of 31 August 2022, about 598 000 people were estimated to be displaced in the Northwest and Southwest regions, while IDPs in the Far North region amounted to almost 378 000.

Congo

Refugee influx

- As of 31 July 2022, an estimated 29 100 refugees from the Central African Republic and 22 100 from the Democratic Republic of the Congo were residing in the country, mostly in Likouala and Plateaux departments. Host communities face pre-existing food shortages and limited livelihood opportunities, and refugees' food security is essentially dependent on continued humanitarian assistance.

Eswatini

High food prices, economic downturn

- The latest IPC analysis indicates that nearly 259 000 people are expected face acute food insecurity at least until March 2023, an improvement compared to the previous year.
- Food insecurity in 2022/23 is driven by the high food prices and the lingering impacts of the COVID-19 pandemic on the economy, which have worsened households' ability to purchase essential items, including foods.

Guinea

Reduced incomes

- About 1.22 million people were estimated to be in need of food assistance between June and August 2022, of which 20 000 in CH Phase 4 (Emergency), primarily due to food access constraints on account of the economic effects of the COVID-19 pandemic. As of September 2022, about 45 000 people have been affected by floods.
- In addition, about 2 200 refugees, mostly from Sierra Leone, are residing in the country.

Lesotho

High food prices, economic downturn

- According to the latest IPC analysis, an estimated at 320 000 people are projected to face IPC Phase 3 (Crisis) levels of acute food insecurity between October 2022 and March 2023, a small improvement on the situation in early 2022.
- Food insecurity conditions are primarily underpinned by high food prices, while a slow economic recovery is further impinging on households' economic capacity to access food.

Liberia

High food prices, economic downturn

- According to the latest CH analysis, about 940 000 people were estimated to be in CH Phase 3 (Crisis) and above between June and August 2021 due to high food inflation rates and the lingering effects of the COVID-19 pandemic on the economy. Production of rice, a main food staple, was estimated at a below-average level in 2021, an additional factor aggravating acute food insecurity in 2022.
- As of August 2022, the country was hosting approximately 2 500 refugees.

- As of September 2022, about 90 000 people have been affected by floods.

Libya

Civil insecurity, economic and political instability, high food prices

- The 2022 Humanitarian Needs Overview states that 0.8 million people (10 percent of the population) need humanitarian assistance, of which 0.5 million require food assistance, including internally displaced or migrants that are residing in, or transiting through, the country.

Madagascar

Extreme weather events, slow economic recovery

- Between January and March 2023, an estimated 2.2 million people are projected to face IPC Phase 3 (Crisis) and above levels of acute food insecurity in southern and southeastern areas, and require urgent humanitarian assistance due to successive years of droughts and the impact of cyclones in 2022. This number is above the 1.64 million people estimated in early 2022.

Mali

Civil insecurity, high food prices

- According to the latest CH analysis, about 1.84 million people were estimated to be in CH Phase 3 (Crisis) and above between June and August 2022, including 156 000 in CH Phase 4 (Emergency), as a result of worsening conflicts, weather shocks, reduced cereal production in 2021 and high food prices.
- As of July 2022, nearly 400 000 people were internally displaced, mostly in central and northern parts of the country. In addition, the country hosts approximately 56 000 refugees, mostly from the Niger, Mauritania and Burkina Faso.

Mauritania

Shortfall in agricultural production, economic downturn

- According to the latest CH analysis, about 878 000 people were assessed to be in need of humanitarian assistance between June and August 2022 as a result of shortfalls in cereal and livestock production in 2021 and reduced incomes owing to the negative effects of the COVID-19 pandemic on the economy. As of September 2022, nearly 40 000 people have been affected by floods.

- As of August 2022, about 92 000 refugees, mostly from Mali, also require humanitarian assistance.

Mozambique

Insecurity in northern areas, extreme weather impacts

- Cyclones and tropical storms in 2022 affected a large number of people, particularly in central provinces, while insecurity in the northern province of Cabo Delgado continues to impact livelihoods and underpins the severest levels of acute food insecurity.
- The latest IPC analysis from December 2021 projected that 1.4 million people were facing acute food insecurity (IPC Phase 3 [Crisis] and above) between April and September 2022.

Namibia

Localized shortfalls in cereal production, economic downturn, high food prices

- High food prices and localized weather-induced shortfalls in cereal production in 2022 are expected to result in a comparable number of people facing acute food insecurity (IPC Phase 3 [Crisis] and above) in the January-to-March 2023 period compared to 2022, when an estimated 750 000 people were in need of assistance.

Senegal

Localized shortfalls in cereal production, reduced incomes

- According to the latest CH analysis, about 881 000 people were estimated to be in need of humanitarian assistance between June and August 2022, mostly on account of localized shortfalls in cereal production in 2021 and reduced incomes owing to the impact of the COVID-19 pandemic. As of September 2022, about 26 000 people had been affected by floods.
- An estimated 12 000 refugees, mostly from Mauritania, require humanitarian assistance.

Sierra Leone

High food prices, reduced incomes

- About 1.6 million people were estimated to be acutely food insecure between June and August 2022 on account of high food prices and low purchasing power, resulting in acute constraints on households' economic access to food. As of September 2022, about 8 000 people have been affected by floods.

Sudan

Conflict, civil insecurity, high food prices, tight supplies

- The number of acutely food insecure (IPC Phase 3 [Crisis] and above) people is projected at 7.7 million between October 2022 and February 2023, mainly due to tight supplies following a below-average 2021 harvest, high food prices and intercommunal conflict.

Uganda

Weather extremes, insecurity, high food prices

- In Karamoja Region, the latest IPC analysis indicates that about 315 000 people, 25 percent of the population, are estimated to be facing acute food insecurity (IPC Phase 3 [Crisis] and above) between August 2022 and February 2023 as a result of consecutive poor rainy seasons that adversely affected crop and livestock production, frequent episodes of cattle rustling leading to the loss of productive assets and high food prices.
- About 962 000 refugees from South Sudan and about 467 000 from the Democratic Republic of the Congo are hosted in camps and rely on humanitarian assistance.

United Republic of Tanzania

Localized shortfalls in staple food production, high food prices

- According to the latest IPC analysis, about 592 000 people are estimated to be in need of humanitarian assistance between May and September 2022, mainly located in northeastern Mara, Arusha, Kilimanjaro and Tanga regions, reflecting crop losses during the October–December “Vuli” 2021 and March–May “Masika” seasons due to poor rains. High food prices are also constraining households' economic access to food.

Zambia

Reduced cereal production, high food prices

- An estimated 1.95 million people are expected to experience acute food insecurity (IPC Phase 3 [Crisis] and above) between October 2022 and March 2023, an increase compared to the 1.6 million people estimated in 2021/22.
- The high level of acute food insecurity is associated with the effects of a below-average cereal harvest and high food prices that have adversely impacted households' food availability and access.

ASIA (9 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Syrian Arab Republic

Civil conflict, economic crisis

- The latest available nationwide food security assessment estimated that about 12 million people, 60 percent of the total population, were acutely food insecure in 2021, a slight decline from the 12.4 million in 2020, but 5 million more than at the end of 2019, mostly due to constrained livelihood opportunities and a rapidly worsening economy.
- Although some international food assistance is being provided, Syrian refugees are also pressuring host communities' resources in neighbouring countries.

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Low food consumption levels, poor dietary diversity, economic downturn

- A large portion of the population suffers from low levels of food consumption and very poor dietary diversity.
- Persisting economic constraints underlie the population's vulnerability to food insecurity and a reduced 2022 crop output, as is currently forecast, may further aggravate conditions.

Lebanon

Economic crisis

- In September 2021, the United Nations Economic and Social Commission for Western Asia estimated that, taking into account multiple factors other than income, such as access to health, education and public utilities, 82 percent of the population lives in multidimensional poverty in 2021, up from 42 percent in 2019.
- Over 1.7 million people were estimated to face acute food insecurity at the end of 2021, based on the World Food Programme's (WFP) rCARI (Consolidated Approach for Reporting Indicators of Food Security) methodology.

Sri Lanka

Serious macroeconomic challenges, significant reduction in 2022 agricultural output, high food prices

- Severe macroeconomic challenges have had a negative impact on the country's

capacity to import cereals, while the 2022 cereal production declined sharply due to a reduced application of agrochemicals.

- Elevated food prices are constraining economic access to food for large number of households.
- As a result, food and nutrition security has deteriorated since the beginning of 2022, with a significant proportion of vulnerable households adopting food and livelihood-related coping strategies.

Yemen

Conflict, poverty, floods, high food and fuel prices

- The number of food insecure, IPC Phase 3 (Crisis) and above, was projected to increase by over 1 million people to 17.4 million between January and May 2022, increasing to 19 million starting from June until the end of the year. Of greatest concern is the 31 000 people facing IPC Phase 5 (Catastrophe); this number is projected to rise to 161 000 from June onwards.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Civil conflict, population displacement, economic slowdown

- The latest IPC analysis estimated that the number of people in IPC Phase 3 (Crisis) and IPC Phase 4 (Emergency) at 18.9 million between June and November 2022.

Bangladesh

Economic constraints, refugee influx, floods

- Food insecurity as well as poverty levels have increased due to income losses caused by the effects of the COVID-19 pandemic.
- About 1 million Rohingya refugees from Myanmar reside in the country, mainly in Cox's Bazar District and on the island of Bhasan Char.
- Floods in May affected approximately 7.2 million people, causing death, damage and destruction to agricultural infrastructure, as well as losses of livestock and food stocks.

Myanmar

Conflict, political instability, economic constraints, high prices of main food staple

- The political crisis, following the military takeover on 1 February 2021, caused increased tensions and unrest throughout the country that resulted in population displacement. According to the latest figures (September 2022) from the United Nations High Commissioner for Refugees (UNHCR), the number of additional displaced people since February 2021 is estimated at 982 000, bringing the number of internally displaced persons (IDPs) to about 1.3 million people. Most of the IDPs reside in Rakhine, Chin, Kachin, Kayin and Shan states. The current uncertain political situation may further compromise the fragile conditions of vulnerable households and the Rohingya IDPs residing in the country.
- Domestic prices of "Emata" rice, the most consumed variety in the country, were at record levels in August 2022, constraining access to a key staple food.
- Income losses due to the impact of the COVID-19 pandemic have also affected the food security situation of vulnerable households.

Pakistan

Severe floods, reduced agricultural production, economic constraints, high prices of the main food staple

- Severe monsoon floods and landslides caused widespread destruction of crops, livestock assets, agricultural infrastructure, food reserves and disrupted the livelihoods of 33 million people.
- According to the latest IPC analysis, about 4.7 million people, 25 percent of the population, were estimated to be facing high levels of acute food insecurity, IPC Phase 3 (Crisis) and above, between April and June 2022 in the 25 districts analysed in Balochistan, Sindh and Khyber Pakhtunkhwa provinces.
- Prices of wheat flour, the country's main staple, were at elevated levels in most markets in August 2022, constraining access to a key staple food.

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

WIDESPREAD LACK OF ACCESS

Venezuela (Bolivarian Republic of)

Economic crisis

- The total number of refugees and migrants from the country is estimated at 6.8 million people, with the largest populations located in Colombia (2.48 million), Peru (1.29 million), Ecuador (502 000), Chile (448 100) and Brazil (358 400). The remaining 0.7 million people are spread across other countries in Latin America and the Caribbean, with about 1 million people located outside the region. Humanitarian needs for refugees and migrants are significant. According to the Inter-Agency Coordination Platform for Refugees and Migrants from Venezuela (R4V), the number of Venezuelan refugees and migrants (in destination) in need of food assistance is forecast at 3.5 million in 2022.

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Reduced agricultural production, sociopolitical turmoil, natural disasters

- About 4.56 million people were estimated to be facing severe acute food insecurity and in need of urgent food assistance between March and June 2022. The high levels of food insecurity are the result of consecutive reduced cereal harvests between 2018 and 2021, and elevated food prices, exacerbated by sociopolitical turmoil and worsening insecurity. The lack of income-earning opportunities amid worsening insecurity and difficult macroeconomic conditions is likely to heighten food insecurity.

NORTH AMERICA, EUROPE AND OCEANIA (1 COUNTRY)

WIDESPREAD LACK OF ACCESS

Ukraine

Conflict

- According to the August update of the Ukraine Flash Appeal 2022, 17.7 million people are estimated to be in urgent need of humanitarian assistance and protection due to the war, including about 6.6 million people who are internally displaced.

Terminology

Countries requiring external assistance for food

are expected to lack the resources to deal with reported critical problems of food insecurity. Food crises are nearly always due to a combination of factors but for the purpose of response planning, it is important to establish whether the nature of food crises is **predominantly** related to lack of food availability, limited access to food, or severe but localized problems. Accordingly, the list of countries requiring external assistance is organized into three broad, not mutually exclusive, categories:

- Countries facing an **exceptional shortfall in aggregate food production/supplies** as a result of crop failure, natural disasters, interruption of imports, disruption of distribution,

excessive post-harvest losses, or other supply bottlenecks.

- Countries with **widespread lack of access**, where a majority of the population is considered to be unable to procure food from local markets, due to very low incomes, exceptionally high food prices, or the inability to circulate within the country.
- Countries with **severe localized food insecurity** due to the influx of refugees, a concentration of internally displaced persons, or areas with combinations of crop failure and deep poverty.

* Unfavourable Production Prospects

Countries facing unfavourable crop production prospects are countries where current conditions indicate a high likelihood that cereal production would fall below the five-year average, as a result of a reduction of the area planted and/or yields

due to adverse weather conditions, plant pests and diseases, conflicts and other negative factors. This list does not include countries where production declines are mainly driven by deliberate/predetermined economic and/or policy decisions (see Regional Reviews):

[*page 12 \(Africa\)*](#)

[*page 21 \(Asia\)*](#)

[*page 34 \(Europe\)*](#)

****** The boundaries and names shown and the designations used on the **maps** do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers and boundaries. Dashed lines on maps represent approximate border lines for which there may not yet be full agreement.

GLOBAL CEREAL OVERVIEW

Cereal supply and demand overview

Lower cereal production outlook underpins downward revisions for utilization and stocks in 2022/23

Persistent drought conditions in northern hemisphere countries have prompted a significant cutback in FAO's latest cereal **production** forecast for 2022. Pegged at 2 774 million tonnes, the 2022 global cereal production has been lowered by 17.2 million tonnes since the previous FAO forecast released in July and is now anticipated to decline by 1.4 percent (38.9 million tonnes) year on year.¹

The bulk of this recent downward revision concerns coarse grains, with global production forecast at 1 483 million tonnes, 17.9 million tonnes lower than expectations in July and 1.8 percent (26.8 million tonnes) down from 2021. Most of the anticipated decrease relates to maize production in the European Union, where exceptionally hot and dry weather conditions that prevailed since late spring are estimated to push down average yields by 16 percent compared to the previous five-year average. Similarly, prospects for maize production in the United States of America are downgraded moderately, largely owing to unfavourable weather in the Midwest that has curbed yield prospects. Precipitation deficits also had negative impacts on expected barley and sorghum yields in the European Union and the United States of America, which largely underpin cuts made to the global production forecasts for both cereals. These decreases more than offset upward revisions made to the maize production forecasts, based on an upturn in yield expectations in Argentina and Ukraine, where production in the latter is still foreseen to decline by 38 percent year on year. By contrast, the forecast for world wheat production in 2022 has been raised by 6.7 million tonnes compared to the figure in July and is now set to reach 777 million tonnes, down only fractionally from the 2021 output. The improved outlook is largely due to conducive weather conditions in Canada and the United States of America,

boosting yield prospects and reinforcing expectations of production recoveries in 2022, and in the Russian Federation, where the wheat outturn is now likely to reach an all-time high as continued beneficial weather bolstered yield expectations of the spring crop. Recently released official estimates also point to a larger-than-previously expected output in China (mainland). Conversely, the continued rainfall shortages across much of the European Union had adverse impacts on wheat production, which has been trimmed moderately. For rice, since July, FAO has lowered its global production forecast for 2022 by 6 million tonnes to 514.5 million tonnes (milled basis), which is 2.1 percent down from the 2021 all-time high but still an above-average crop. The revision primarily reflects the effects of an uneven rainfall distribution in southern Asia. This

is particularly the case of India, but also of Bangladesh, where, however, sowing activities are still ongoing, providing room for initial setbacks to be recouped should growing conditions in the upcoming weeks prove more normal. The production forecast was also reduced for Sri Lanka, based on official assessments of the impact of severe input shortages on the main crop yields. Coupled with some downward adjustments to output prospects for the European Union, the United States of America and Viet Nam, these cuts overshadowed upward output revisions for Brazil and a few West African countries.

FAO's forecast for 2022/23 world cereal **utilization** has been lowered by 5.1 million tonnes since July to 2 792 million tonnes, representing a marginal decline of 0.1 percent (2.8 million tonnes) from the 2021/22 level.

Table 1. World cereal production
(million tonnes)

	2020	2021 estimate	2022 forecast	Change: 2022 over 2021 (%)
Asia	1 231.9	1 239.8	1 238.4	-0.1
Far East	1 117.5	1 148.3	1 138.5	-0.9
Near East	79.0	61.2	66.9	+9.3
CIS in Asia	35.3	30.2	33.0	+9.4
Africa	198.7	202.3	193.4	-4.4
North Africa	31.4	37.6	31.6	-15.9
West Africa	66.9	63.9	66.0	+3.3
Central Africa	6.7	6.8	6.8	+0.5
East Africa	57.2	53.7	53.3	-0.8
Southern Africa	36.4	40.2	35.6	-11.4
Central America and the Caribbean	42.6	42.7	41.4	-3.2
South America	232.5	227.5	251.8	+10.7
North America	495.1	495.9	494.7	-0.3
Europe	524.4	549.9	507.3	-7.7
European Union ¹	284.5	298.0	276.4	-7.2
CIS in Europe	204.1	214.3	193.4	-9.8
Oceania	50.1	55.2	47.4	-14.1
World	2 775.2	2 813.2	2 774.3	-1.4
- wheat	776.0	778.1	777.0	-0.1
- coarse grains	1 482.3	1 509.6	1 482.8	-1.8
- rice (milled)	517.0	525.5	514.5	-2.1

Notes: Includes rice in milled term. Totals and percentage change computed from unrounded data.

¹ Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

¹ For further information on global food markets please see [FAO World Food Situation](#).

Making up the bulk of the recent downward revision, the 2022/23 utilization forecast for coarse grains has been lowered by 6.6 million tonnes since expectations from July, mostly reflecting lower-than-earlier anticipated feed use of barley, in particular in the European Union, Morocco and Saudi Arabia, and sorghum, especially in China (mainland) and the United States of America. With this downward revision, utilization of coarse grains in 2022/23 is now forecast to decline by 0.2 percent (2.7 million tonnes) from the 2021/22 level, mostly underpinned by expectations of lower feed use, especially in the United States of America, Morocco, Mexico and the European Union, stemming from the anticipated year-on-year production falls. By contrast, a higher wheat production outlook has lifted the 2022/23 wheat utilization forecast by 2.2 million tonnes since July and is now seen remaining near the 2021/22 level of 773 million tonnes, with an anticipated annual food consumption growth balancing an expected contraction in feed use. Following an 800 000-tonne downward revision, FAO now anticipates world rice utilization in 2022/23 to remain largely steady year on year at an all-time high of 522.2 million tonnes, as lingering strong demand for food could offset likely cuts in other end uses of rice, in particular for animal feed.

Stemming from the downward revision to the 2022 world cereal production, the forecast for world cereal **stocks** by the close of the 2023 seasons has also been cut by 9.3 million tonnes since July, dropping to 845 million tonnes, down 2.1 percent (18.5 million tonnes) from their opening levels. As a result, the world cereal stocks-to-use ratio is expected to fall slightly from 30.9 percent in 2021/22 to 29.5 percent in 2022/23, the lowest level since 2013/14 but still relatively high from an historical perspective. The downward adjustment to global cereal stocks is largely the result of lower maize inventories foreseen in the European Union, triggered by reduced production prospects since the previous report in July. Following an 8.3-million-tonne downward revision, global coarse grain stocks are forecast to contract by 4 percent (14.7 million tonnes) below their opening levels, down to 355 million tonnes, with inventory drawdowns forecast for maize, barley and sorghum of 3.3 percent, 7.7 percent and 10.4 percent, respectively. Forecast at 299 million tonnes, nearly unchanged since July, global wheat inventories at the close of the 2023 season are predicted to rise marginally (0.7 percent or 2 million tonnes) above their opening levels.

However, most of the anticipated year-on-year increase is concentrated in China (mainland) and the Russian Federation, and to a lesser extent in Canada and Ukraine. By contrast, sizeable drawdowns are anticipated in the European Union and India, with smaller declines foreseen in Australia, the United States of America and several countries in Asia, the Near East and North Africa. FAO's forecast of world rice stocks at the close of the 2022/23 marketing years is now pegged at 190.9 million tonnes, down 2.9 percent (5.8 million tonnes) from a revised 2021/22 all-time high and 800 000 tonnes less than previously anticipated in July. Although the major rice exporters account for most of this downward revision and an expected year-on-year contraction, aggregate reserves of rice held by the group are still seen at their second highest level on record, at 54 million tonnes, thanks to sizeable anticipated 2022 harvests and ample opening inventories, especially in India.

World **trade** in cereals in 2022/23 is forecast at 469.6 million tonnes, up 2 million tonnes since the July forecast but still 1.9 percent below the 2021/22 level. At 191.3 million tonnes, the forecast for world wheat trade in 2022/23 (July/June) remains nearly unchanged since July and still points to a 1.8 percent decline from the 2021/22 (July/June) level. Greater wheat export prospects for Canada and the Russian Federation, boosted by higher production forecasts, are balanced by lower expected shipments from the European Union, as a result of lower production prospects, and India, where the country's efforts to control rising domestic prices through wheat export

restrictions are seen tempering exports. Although Ukraine resumed grain shipments from its Black Sea ports in August 2022 as part of the Black Sea Grain Initiative, FAO has kept its forecast for wheat exports by Ukraine unchanged at 10 million tonnes. However, increased maize production expectations in Ukraine lifted FAO's forecast for Ukrainian maize exports in 2022/23 by 2million tonnes to 17 million tonnes. Larger-than-earlier-expected maize shipments are also seen for Argentina and Brazil, on account of near-record and record harvest levels, respectively. These revisions, along with bigger maize purchases forecast for the European Union to compensate for the foreseen lower production, result in a 3.4-million-tonne upward revision to FAO's forecast for global maize trade in 2022/23 (July/June), which is now on par with the 2021/22 estimated level of 181 million tonnes. Nonetheless, world trade in coarse grains in 2022/23 (July/June) is forecast to fall by 2.6 percent from 2021/22, to 223 million tonnes, as a result of expected declines in the global trade of barley and sorghum. In the case of barley, the decline is mostly due to foreseen reductions in demand from China (mainland) and Türkiye, and smaller shipments from Australia and Ukraine, whereas in the case of sorghum, the decline stems almost exclusively from expectations of tighter export availabilities in the United States of America and smaller imports by China (mainland). International trade in rice is seen reaching 54.4 million tonnes in 2022 (January/December) and 55 million tonnes in 2023. India is predicted to remain the largest rice exporter in the world, shipping over 20 million tonnes annually.

Table 2. Basic facts of world cereal situation
(million tonnes)

	2020/21	2021/22 estimate	2022/23 forecast	Change: 2022/23 over 2021/22 (%)
Production¹	2 775.2	2 813.2	2 774.3	-1.4
Trade²	479.9	478.5	469.6	-1.9
Utilization	2 758.6	2 795.2	2 792.4	-0.1
Per caput cereal food use (kg per year)	148.4	149.0	149.3	+0.2
Stocks³	834.8	863.5	845.0	-2.1
World stock-to-use ratio (%)	29.9	30.9	29.5	-4.7

Note: Totals and percentage change computed from unrounded data.

¹ Data refer to calendar year of the first year shown and includes rice in milled terms.

² For wheat and coarse grains, trade refers to exports based on July/June marketing season. For rice, trade refers to exports based on the calendar year of the second year shown.

³ Data are based on an aggregate of carryovers level at the end of national crop years and, therefore, do not represent world stock levels at any point in time.

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW

Adverse weather curbs 2022 cereal harvests in low-income food-deficit countries

FAO's latest forecast for the aggregate 2022 cereal production of low-income food-deficit countries (LIFDCs)² stands at 184.4 million tonnes, moderately below the outturn of 2021. The expected result mostly reflects reduced production prospects in the LIFDCs of the *East Africa* and *Near East Asia* subregions.

In aggregate, the 2022 cereal production among LIFDCs in *Africa* is pegged at a slightly below-average level of 111.4 million tonnes. The downturn is largely on account of the effects of multi-season drought conditions in *East Africa*, particularly affecting parts of **Ethiopia, Kenya and Somalia**. The substantial rainfall deficits resulted in widespread crop wilting and the aggregate cereal production in *East African* LIFDCs is forecast to decrease by 3 percent in 2022 compared to the five-year average. Unfavourable weather conditions have also led to a significant shortage of pasture and water resources, causing widespread animal deaths. In *West Africa*, harvesting of the 2022 crops is underway. Despite the impact of some floods, as well as pockets of dry weather conditions, overall abundant rainfall has been beneficial for crops and aggregate production of LIFDCs in *West Africa* is forecast at an above-average level in 2022. This follows a reduced output in 2021. In *Southern Africa*, with the main

crops harvested earlier in the year, total cereal production is forecast at an average level, but down from the previous year's good outturn due to expectations from July temporal distribution of seasonal rains in some areas. Production of cereals in *Central Africa* is forecast to remain virtually unchanged on a yearly basis in 2022 and similar to the five-year average, as persisting conflicts continue to curtail production.

In *Asia*, reduced cereal outputs are estimated in *Near East* countries, namely **Afghanistan and the Syrian Arab Republic**. The low harvests are caused by an erratic distribution of seasonal rains and persisting difficult economic conditions that have constrained farmers' ability to access sufficient agricultural inputs. By

contrast, in the *Far East* subregion, a well above-average cereal harvest is estimated in **Bangladesh** in 2022, underpinned by a large planted area. In the remaining two LIFDCs of the subregion, cereal harvests in **Nepal and the Democratic Republic of Korea** are pegged at below-average levels reflecting the impact of poor rainfall amounts and low availability of agricultural inputs. Near-average cereal outturns are forecast in *CIS Asian* countries, mainly due to generally beneficial weather conditions.

In *Central America and the Caribbean*, the 2022 cereal production in **Haiti** is forecast at a below-average level in 2022, largely owing to reduced plantings and poor yield prospects, as farmers continue to face access constraints with regard to purchasing agricultural inputs.

Table 3. Basic facts of low-income food-deficit countries (LIFDCs) cereal situation
(million tonnes, rice in milled basis)

	2020/21	2021/22 estimate	2022/23 forecast	Change: 2022/23 over 2021/22 (%)
Cereal production¹	194.2	185.1	184.4	-0.4
Utilization	247.9	248.1	252.0	+1.6
Food use	182.5	186.1	191.7	+3.0
Per caput cereal food use (kg per year)	151.9	151.2	152.2	+0.7
Feed	29.3	27.8	27.3	-2.1
End of season stocks²	59.2	56.9	50.2	-11.8

¹ Data refer to calendar year of the first year shown.

² May not equal the difference between supply and utilization because of differences in individual country marketing years.

² The inclusion of a country in the low-income food-deficit countries (LIFDCs) group is based on three criteria: 1) the level of the annual per capita Gross National Income (GNI); 2) the net food trade position; and 3) self-exclusion (when countries that meet the first two criteria request to be excluded from the category). For full details see: www.fao.org/countryprofiles/lifdc

High prices, high import needs

Despite falling between June and August 2022, international cereal prices remained at elevated levels. Reflecting this situation and compounding domestic factors, most prominently currency depreciations domestic retail prices of key cereal staple foods in [several LIFDCs](#) were at significantly higher year-on-year levels as of August 2022. Given an expected upturn in import needs and in consideration of the high vulnerability of households in LIFDCs to price upswings, as they spend on average a substantial share of income on food, these conditions are severely aggravating food insecurity.

In total, the cereal import requirements for LIFDCs have been forecast at 65.5 million tonnes in the 2022/23 marketing year, an increase of 8 percent compared to the five-year average. The bulk of the growth in import needs comes from *sub-Saharan African* countries, particularly in *East Africa*, where adverse weather conditions have curtailed domestic production prospects, and in *West Africa*, as countries seek to build up supplies following reduced outputs in 2021. Supply conditions are foreseen to be particularly tight in *East African* countries, where stocks are likely to have been drawn down in 2021/22 following the below-average aggregate production obtained in 2021. In *Southern Africa*, import needs have grown moderately compared to the five-year average, as two years of bumper cereal outturns have built up national stocks they are expected to limit import requirements in 2022/23, despite the lower harvest in 2022.

In *Asian* countries, aggregate import needs in 2022/23 are forecast 5 percent above the five-year average. Import requirements are forecast to rise steeply in **Afghanistan** and **Nepal** on account of reduced harvests in 2022. Elsewhere in the region, import requirements are at near-average levels.

Table 4. Cereal production of LIFDCs

(million tonnes)

	5-year average	2021 estimate	2022 forecast	Change: 2022 over 2021 (%)
Africa (36 countries)	112.1	112.4	111.4	-0.9
East Africa	54.9	53.7	53.3	-0.8
Southern Africa	11.6	14.2	11.7	-17.1
West Africa	38.8	37.8	39.6	+4.8
Central Africa	6.9	6.8	6.8	+0.5
Asia (9 countries)	72.5	71.7	72.0	+0.5
CIS in Asia	10.0	9.2	10.0	+8.4
Far East	54.0	56.1	55.7	-0.6
Near East	8.5	6.4	6.4	-1.0
Central America and the Caribbean (2 countries)	1.1	1.0	1.0	-2.8
LIFDCs (47 countries)	185.6	185.1	184.4	-0.4

Notes: Includes rice in milled terms. Totals and percentage change computed from unrounded data. The five-year average refers to the 2017-2021 period.

Table 5. Cereal imports of LIFDCs

(thousand tonnes)

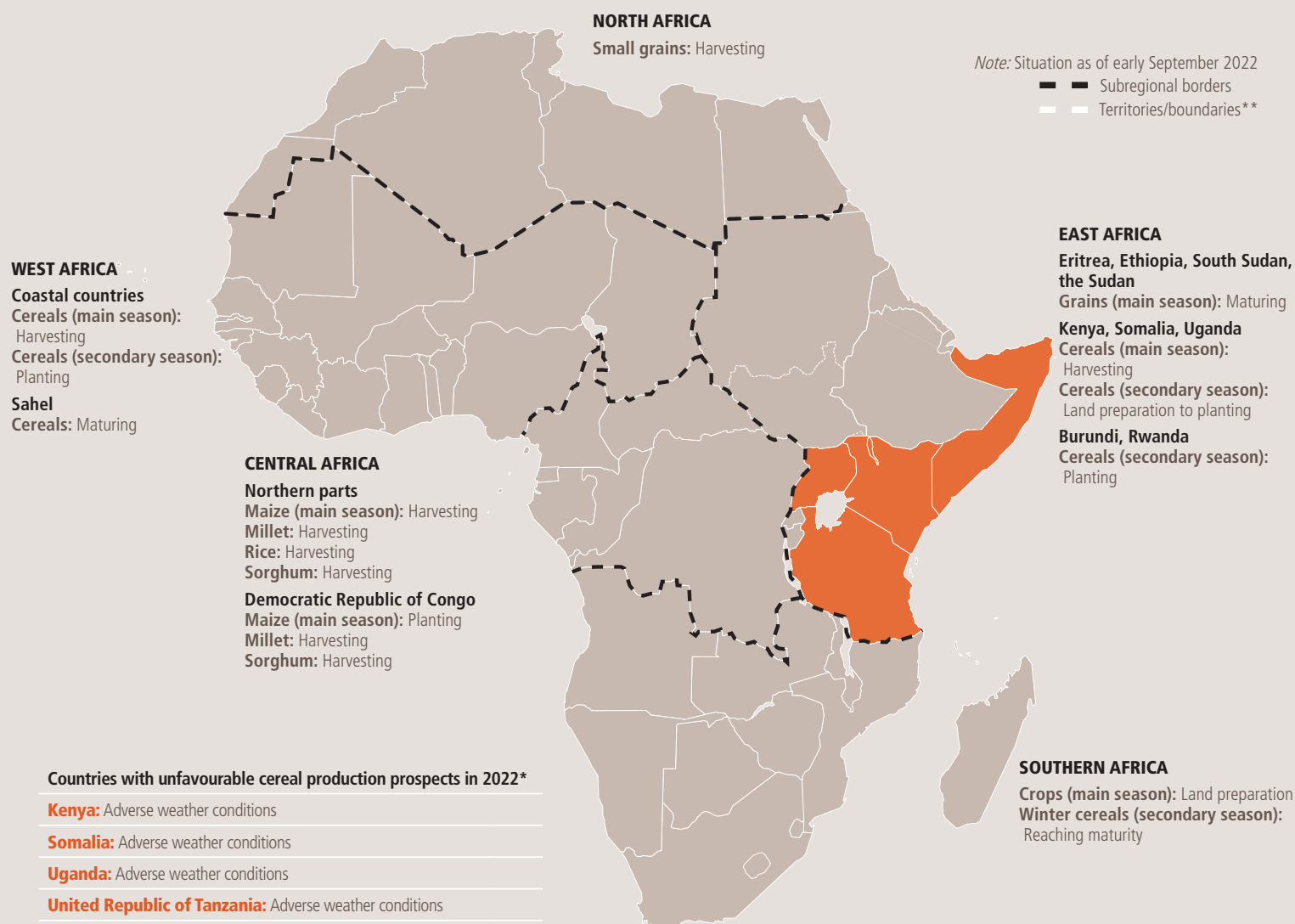
	2020/21 or 2021	2021/22 or 2022	2022/23 or 2023
	Actual imports	Import estimate	Import requirement ¹
Africa (36 countries)	31 831	33 400	34 650
East Africa	12 320	14 200	14 886
Southern Africa	3 930	2 950	3 167
West Africa	12 917	13 419	13 755
Central Africa	2 664	2 830	2 842
Asia (9 countries)	28 823	29 257	29 004
CIS in Asia	5 718	5 481	5 222
Far East	12 642	12 580	12 774
Near East	10 464	11 196	11 009
Central America and the Caribbean (2 countries)	1 575	1 503	1 592
LIFDC (47 countries)	62 229	64 160	65 246

Note: Totals computed from unrounded data.

¹ The import requirement is the difference between utilization (food, feed, other uses, exports plus closing stocks) and domestic availability (production plus opening stocks).

REGIONAL REVIEWS

AFRICA



*/** See Terminology (page 7).

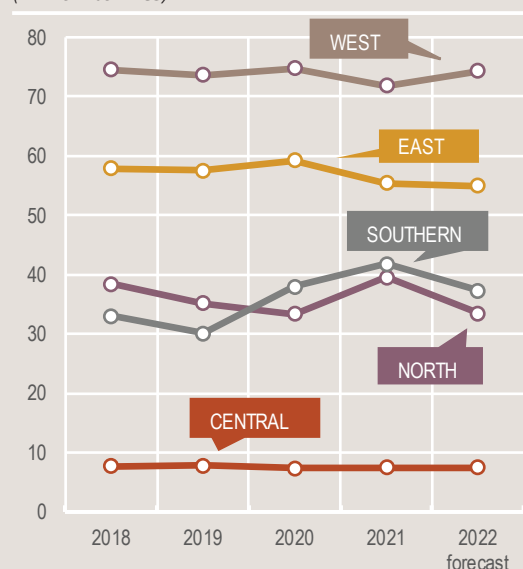
Final boundary between the Republic of the Sudan and the Republic of South Sudan has not yet been determined.

Source: GIEWS, 2022. *Crop Prospects and Food Situation #3* [online]. [Cited 30 September 2022], modified to comply with the United Nations map No. 4045 Rev. 8, 2018.

Production Overview

Adverse weather conditions are largely behind the expected decrease in cereal production in Africa in 2022. Pegged at 207.5 million tonnes, the aggregate 2022 cereal outturn is 1.4 percent below the previous five-year average. The impact of drought conditions on wheat crops in North Africa, especially in Morocco, account for the bulk of the production decline at the continental level. Analogously, widespread and substantial rainfall deficits have curtailed harvest prospects in East Africa and total production is forecast to drop below the average in 2022. In West Africa, the harvest is ongoing and cereal production is foreseen to increase to an above-average level in 2022 owing to abundant rains which also caused flooding, resulting in crop losses and damages. In Southern Africa, where the bulk of the 2022 crop was gathered earlier in the year, adverse weather conditions caused a year-on-year production decline, but the aggregate output remains marginally above average. In Central Africa, agricultural production in 2022 continues to be constrained by conflicts, population displacements and high inputs prices.

Cereal production
(million tonnes)



NORTH AFRICA



Drought-reduced 2022 cereal production leads to high subregional import requirements

The 2022 wheat and barley harvests were completed by mid-July in **Egypt**, **Libya** and **Morocco**, while in **Algeria's** highlands harvesting activities concluded in mid-August 2022. Maize and rice crops in **Egypt**, grown as summer crops, will be harvested from early October.

With the exception of **Egypt**, most cereals are produced in rainfed systems, making crop production markedly variable from year to year due to rainfall deviations. Following prolonged drought conditions in western areas in the first half of the cropping season, abundant rainfall in March and April 2022, up to 40 percent above the average, benefited crop recovery in most of **Tunisia** and in central and eastern regions of **Algeria**. However, these improved rains were too late to allow an adequate recovery in vegetation conditions in **Morocco**, as the crops were already at grain filling stage.

Consequently, total cereal production in **Morocco** is estimated at 3.3 million tonnes in 2022, including 2.5 million tonnes of wheat, about 55 percent below the five-year average and 65 percent less than the exceptional production in 2021. In **Algeria**, cereal production is estimated at 4.1 million tonnes, including 3 million tonnes of wheat, about 12 percent below the five-year average but 17 percent more than the previous year's weather-stricken harvest. In **Tunisia**, the 2022 cereal harvest reached a close-to-average

level of 1.8 million tonnes, about 9 percent above the 2021 harvest. In **Libya**, overall rainfall amounts in the main producing areas along the coast were satisfactory and cereal production is estimated at a slightly below-average level of 209 000 tonnes, unchanged from the previous year.

In **Egypt**, where irrigation is mostly used, total cereal output is estimated at a slightly above-average level of 24 million tonnes, about 350 000 tonnes above the 2021 production. Reflecting the government's target to reduce import dependency, wheat production of 9.7 million tonnes is about 7 percent above the harvest in 2021 and almost 10 percent above the five-year average on account of an area expansion and a broader use of improved seeds.

In total, the subregional 2022 aggregate cereal production is forecast at 33.5 million tonnes, about 10 percent below the average and 15 percent down from the previous year's level. The aggregate wheat harvest is estimated at 16.6 million tonnes, about 12 percent lower year on year and 19 percent below the average.

All countries in the subregion rely heavily on wheat imports to cover their domestic consumption needs. Reflecting a below-average 2022 output, the subregion's aggregate cereal import requirement, of which wheat accounts for about 60 percent, is estimated at 52.2 million tonnes in the 2022/23 marketing year (July/June), almost 5 percent above the five-year average. Despite the elevated price levels and uncertainty on the global commodity markets, part of the wheat and rice imports are going to be used to boost stocks with the aim to improve domestic preparedness in case of additional future market shocks. Although the share of cereals sourced from the Russian Federation and Ukraine differs between countries, and as such not all were identifying alternative suppliers in case

of additional export disruptions from the Russian Federation and Ukraine, elevated international agricultural prices are putting pressure on the balance of payments.

Food inflation rates steadily increasing

With the exception of **Libya**, year-on-year food inflation rates remained at elevated levels or increased steadily in 2022 reflecting high international commodity prices as well as depreciations of the national currencies. However, subsidies on many basic commodities have prevented the complete transmission of the elevated international food prices to domestic markets.

In **Morocco**, the annual food inflation rate increased from negative values in December 2020 to 12.5 percent in July 2022, a multi-year high. In **Egypt**, where the food price inflation is more volatile due to a large share of unsubsidized products in the consumer price index, such as vegetables, the rate increased from single digits in the last quarter of 2021 to 26 percent in April 2022, before easing slightly to 23 percent in August 2022. In **Tunisia**, estimated at 12 percent in August 2022, the annual food inflation rate reached the highest level since the beginning of the food price inflation series in 2007. Similarly in **Algeria**, food prices increased 17 percent year on year in June 2022, the highest since the beginning of the series in 2010.

In **Libya**, the annual food inflation rate between September 2021 and May 2022 (latest available information) fluctuated between 4.5 and 6 percent, the lowest levels in the subregion. According to the 2022 Libya Humanitarian Needs Overview, about 0.8 million people (10 percent of the population) are estimated to be in need of humanitarian assistance, down from 1.3 million one year earlier. This figure includes 500 000 people requiring food assistance, about one-third less than in 2021.

Table 6. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
North Africa	18.9	20.4	16.6	12.4	12.9	11.0	6.0	6.3	5.9	37.3	39.5	33.5	-15.4
Algeria	3.2	2.5	3.0	1.4	1.0	1.1	0.0	0.0	0.0	4.6	3.5	4.1	+17.1
Egypt	8.8	9.0	9.7	8.2	8.5	8.5	5.9	6.2	5.8	22.9	23.7	24.0	+1.5
Morocco	5.7	7.5	2.5	2.1	2.9	0.8	0.1	0.1	0.1	7.9	10.5	3.3	-68.4
Tunisia	1.2	1.2	1.3	0.6	0.5	0.6	0.0	0.0	0.0	1.7	1.7	1.8	+9.3

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017-2021 period.

WEST AFRICA



Overall favourable prospects for 2022 cereal crops despite flooding and conflicts

In coastal countries along the Gulf of Guinea, namely **Benin, Côte d'Ivoire, Ghana, Nigeria** and **Togo**, harvesting of the main season maize crops concluded recently, while harvesting of millet, sorghum, rice and the second season maize crops is expected to take place during the last quarter of the year. In Sahelian countries, **Burkina Faso, Chad, Mali, the Niger, Mauritania** and **Senegal**, harvesting of the coarse grains and rice crops is underway, while the cereal harvest is about to start in **Guinea-Bissau, Guinea** and **Sierra Leone**.

The 2022 rainy season had a timely start in most countries, supporting planting activities and crop establishment. Between June and August 2022, in parts of southwestern **Mauritania**, central **Mali** and northeastern **Nigeria**, dry spells adversely affected developing crops, while in the rest of the subregion above-average rainfall amounts boosted soil moisture levels and resulted in above-average vegetation conditions in cropped areas. Although the abundant rains were mostly beneficial for crops, localized flooding also occurred

between June and September in several countries, causing disruptions to livelihoods, damage to standing crops and significant losses of productive assets. Based on rainfall forecasts for October, there is a high risk of additional floods in **Chad, Côte d'Ivoire, Gambia, Ghana, Guinea, Guinea-Bissau, Mali, the Niger, Nigeria, Senegal** and **Sierra Leone**.

Insecurity and persisting civil conflicts continued to severely affect agricultural activities, mainly through population displacements and constraints on farmers' access to land and agricultural inputs. The impacts have been particularly pervasive in areas of **Burkina Faso, Chad, Mali, the Niger** and **Nigeria**. In addition, reduced use of agricultural inputs, especially fertilizers, due to high prices and low availability, associated with the conflict in Ukraine, is likely to curb yields. According to a recent subregional assessment conducted by FAO, WFP, the Economic Community of West African States (ECOWAS) and the Permanent Interstate Committee for drought control in the Sahel (CILSS), access constraints to fertilizers were particularly high in **Burkina Faso, Ghana** and **Mali**.

Overall, 2022 cereal production is preliminarily forecast at 74.3 million tonnes, near the five-year average and 3 percent above the level in 2021, which was affected by dry weather conditions in the Sahel.

Prices of coarse grains increased in the Sahel but decreased in coastal countries

In Sahelian countries, prices of coarse grains increased between June and August 2022, reaching exceptionally high levels. These

price hikes reflect strong domestic demand during the lean season and below-average market supplies. The reduced availability of cereals stemmed from the low cereal outputs in 2021 and reduced trade flows, a result of economic sanctions introduced by ECOWAS on Mali, restrictions on exports of cereals and cereal products, and high import costs of commodities partly associated with the war in Ukraine. In **Mali** and **Burkina Faso**, prices of coarse grains more than doubled in the 12 months to August 2022, and in **the Niger**, prices increased by 40 percent, with poor security conditions in all three countries a key factor underpinning the steep increases. In **Senegal** and **Chad**, prices of maize, millet and sorghum increased steadily in the first half of 2022 and, as of July, they were between 40 and 60 percent higher year on year, supported by reduced supplies. In **Cabo Verde** and **Mauritania**, prices of imported rice and wheat were up to 75 and 130 percent, respectively, above their year-earlier levels as of June 2022, reflecting rising prices on international markets, with spill over effects intensified by currency depreciations.

In coastal countries of the Gulf of Guinea, prices of coarse grains were generally stable or decreased between June and August 2022, reflecting the recent harvest of the main season crops. However, prices still remained higher year on year, owing to strong export demand from Sahelian countries and upward pressure from the high global energy and cereal prices. In **Ghana**, prices of maize, sorghum and millet were up to 75 percent higher on a yearly basis in August 2022, predominantly as a result of strong export demand and

Table 7. West Africa cereal production

(million tonnes)

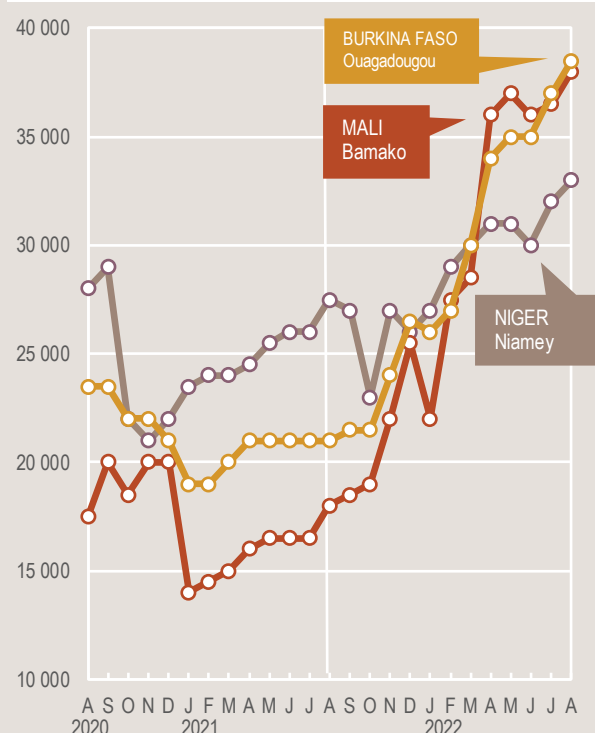
	Coarse grains			Rice (paddy)			Total cereals ¹			
	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
West Africa	51.6	50.5	51.9	21.0	21.2	22.3	72.7	71.8	74.3	+3.5
Burkina Faso	4.4	4.3	4.3	0.4	0.5	0.5	4.8	4.7	4.7	+0.8
Chad	2.6	2.5	2.4	0.3	0.2	0.3	2.8	2.7	2.7	+0.6
Ghana	3.3	4.2	3.8	0.9	1.0	0.9	4.1	5.2	4.6	-10.8
Mali	6.9	6.4	6.7	2.9	2.4	2.7	9.8	8.8	9.5	+7.6
Niger	5.2	3.4	5.3	0.1	0.1	0.1	5.3	3.5	5.4	+53.2
Nigeria	21.2	21.1	21.1	8.2	8.3	8.8	29.5	29.5	30.0	+1.6

Notes: This production data is from early November and does not include figures from the latest CILSS meeting. Totals and percentage change computed from unrounded data. The five-year average refers to the 2017-2021 period.

¹ Total cereals includes wheat, coarse grains and rice (paddy).

a depreciation of the national currency. In **Togo**, prices of maize and sorghum declined between June and August 2022, and were near their August 2021 levels. In **Benin**, reflecting adequate market supplies, prices of maize and sorghum were generally below their year-earlier levels. In **Nigeria**, prices of maize and sorghum remained stable or decreased seasonally between May and July. On average, prices of coarse grains were near their year-earlier levels.

Millet prices in selected West African markets
(CFA franc BCEAO/100 kg)



Source: Afrique Verte.

Food insecurity increases in 2022, reaching record levels in most countries

Food insecurity has reached an unprecedented level in 2022. According to the latest Cadre Harmonisé (CH) analysis carried out in March 2022, the number of people facing acute food insecurity (CH Phase 3 [Crisis] and above) was estimated at about 38.3 million people between June and August 2022. This is the highest level on record since the first

CH analysis was conducted in 2014 and well above the 27.1 million people estimated for the same period in 2021. This figure includes about 2.7 million people in CH Phase 4 (Emergency). The countries with the highest levels of acute food insecurity are: **Nigeria** (19.45 million), **the Niger** (4.4 million), **Burkina Faso** (3.45 million), **Chad** (2.1 million) and **Mali** (1.84 million). A significant deterioration of food insecurity in 2022 was also estimated in **Sierra Leone**, **Guinea** and **Benin**.

The extremely high levels of food insecurity reflect the below-average cereal production in 2021 in Sahelian countries, high food prices, reduced trade flows and conflict-related disruptions to agricultural

livelihoods and markets. The widespread upsurge of violent incidents has also caused large-scale populations displacements in 2022, forcing many rural households to abandon their crops, notably in **Burkina Faso**, **the Niger** and **Nigeria**. According to the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), as of July 2022, about 6.17 million people were internally displaced in **Burkina Faso**, **Chad**, **Mali**, **the Niger** and **Nigeria**, compared to the 5.35 million estimated in mid-2021, while 1.05 million people have sought shelter as refugees in neighbouring countries.

The actual number of acutely food insecure people is, however, likely to be higher than the current estimates indicate, which were produced prior to the start of the war in Ukraine. Food availability and access are estimated to be worse than previously foreseen due to the unfolding effects of the war on commodity prices, particularly in countries that rely heavily on food imports, such as **Cabo Verde** and **Mauritania**, and in countries with high food inflation rates and weakened currencies, namely **Ghana**, **Nigeria** and **Sierra Leone**. In addition, the widespread floods affected about 1.2 million people in the subregion, as of September 2022, mostly located in regions already affected by high levels of food insecurity, malnutrition, instability and violence. New CH estimates on the number of people facing acute food insecurity in the last quarter of 2022 are expected to be released in November by the CILSS.

CENTRAL AFRICA



Cereal production in 2022 constrained by conflicts and high input prices

In the unimodal rainfall northern areas of **Cameroon** and the **Central African Republic**, harvesting of the 2022 millet and sorghum crops began in the second half of September. In central and southern areas of both countries, harvesting of the 2022 main maize crop started in mid-August 2022 and is currently ongoing. In the northern provinces of the **Democratic Republic of the Congo**, harvesting of the 2022 main maize crop is expected to begin in October, while planting of the 2022 main season maize crops is ongoing in the central provinces of the **Democratic Republic of the Congo**, the **Republic of the Congo** and **Gabon**. Weather conditions have been generally favourable across the subregion during the season. In some northwestern and centraleastern areas of the **Democratic Republic of the Congo**, in the Northwest Region of **Cameroon** and across parts of the **Central African Republic**, above-average precipitation amounts since July benefitted crop yields, but also

caused flooding and localized damage to standing crops. The ongoing insecurity and consequent population displacements in the Central African Republic, eastern areas of the Democratic Republic of the Congo and Far North, Northwest and Southwest regions of Cameroon continue to affect agricultural activities and limit farmers' access to crop growing areas and agricultural inputs. Elevated international prices of fertilizers, largely imported, have also constrained access, particularly for smallholder farmers. This results in either suboptimal use, curbing yields, and/or reduced area under cultivation, with negative impacts on the 2022 crop production.

Prices of imported food remain at high levels

In **Cameroon**, the **Central African Republic** and the **Democratic Republic of the Congo**, prices of imported food commodities, such as rice, wheat flour and vegetable oil, remained at high levels in the third quarter of 2022 compared to the previous year. This reflects the high prices of food commodities on the international market and elevated transportation costs.

According to the International Monetary Fund (IMF), the average annual inflation rates in 2022 are expected to increase moderately year on year in **Cameroon**, the **Republic of the Congo** and **Gabon**, to about 3 percent. By contrast, inflation rates are forecast to decline slightly in the **Central African Republic** and the **Democratic Republic of the Congo**

to 4 percent and 6.4 percent, respectively. Despite the decline, these figures remain higher than the rates prior to the COVID-19 pandemic, which had caused supply chain disruptions and contributed to pushing up food prices.

Over 30 million people severely food insecure in 2022

About 30.6 million people are estimated to be facing severe acute food insecurity in the **Democratic Republic of the Congo**, **Cameroon** and the **Central African Republic**, about one-quarter of the aggregate population. Ongoing conflicts continue to cause population displacements and widespread disruptions to agricultural and marketing activities. In addition, households' purchasing power has been significantly reduced by the high prices of staple foods. In the **Democratic Republic of the Congo**, according to the latest IPC analysis, released in September 2021, 26 million people (about 25 percent of the total population) were projected to experience acute food insecurity (IPC Phase 3 [Crisis] or above) between January and June 2022. In the **Central African Republic**, 2.2 million people (about 45 percent of the total population) were forecast to be in IPC Phase 3 (Crisis) and above between April and August 2022. In **Cameroon**, according to the March 2022 CH analysis, about 2.4 million people (9 percent of the total population) were forecast to be facing acute food insecurity (CH Phase 3 [Crisis] and above) between June and August 2022.

Table 8. Central Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
Central Africa	5.9	5.8	5.8	1.6	1.6	1.6	7.6	7.4	7.5	+0.6
Cameroon	3.5	3.4	3.4	0.3	0.3	0.3	3.8	3.7	3.7	+0.8
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.2	0.2	0.2	-5.6
Democratic Republic of the Congo	2.2	2.2	2.2	1.3	1.3	1.3	3.5	3.5	3.5	+0.6

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017-2021 period.

¹ Total cereals includes wheat, coarse grains and rice (paddy).

EAST AFRICA



Famine expected in Somalia due to unprecedented multi-season droughts

In **Somalia**, northern and eastern **Kenya**, and southern **Ethiopia**, a prolonged drought, which began in late 2020, is assessed as the worst in the last 40 years, and has severely affected livelihoods of the local population. With forecasts pointing to a poor October–December rainy season, food insecurity conditions are expected to continue to deteriorate.

In **Somalia**, if humanitarian assistance is not urgently scaled up, famine is expected to occur in Baidoa and Burhakaba districts of Bay Region between October and December 2022. During this period, about 6.7 million people (over 40 percent of the total population) are projected to face severe acute food insecurity at national level, including about 300 000 people in IPC Phase 5 (Catastrophe) levels of food insecurity. In northern and eastern pastoral and marginal agriculture areas of **Kenya**, the number of acute food insecure people is projected at 4.4 million between October and December 2022, almost 90 percent higher on a yearly basis. In southern regions of **Ethiopia** (SNNP, Oromia and Somali regions), the drought is affecting

more than 8 million people and, in the Somali Region alone, the worst affected area, 4.1 million people are estimated to be severely food insecure, 25 percent up from last year.

According to the 2022 Humanitarian Response Plan, 20.4 million people are estimated to be severely food insecure in **Ethiopia**, 2.4 million more than the previous year. The difficult and worsening food insecurity situation is driven, in addition to the drought in southern areas, by the conflict in northern Tigray Region and in adjacent areas of Amhara and Afar regions, with 5.3 million people estimated to be facing severe acute food insecurity in the Tigray Region alone. In **South Sudan**, about 7.7 million people (two-thirds of the total population) were estimated to face severe acute food insecurity between April and July, 8 percent more on a yearly basis. In Jonglei, Lakes and Unity states, between 60 and 80 percent of the population is estimated to be acutely food insecure, with about 87 000 people facing IPC Phase 5 (Catastrophe). The main drivers are protracted macroeconomic challenges resulting in rampant inflation, insufficient food supplies, livelihood losses due to consecutive years of widespread floods and the escalation of organized violence at subnational level since 2020. In **the Sudan**, about 7.7 million people are estimated to be acutely food insecure between October 2022 and February 2023, about 20 percent more on a yearly basis. The high prevalence of food insecurity is caused by a difficult and persistent macroeconomic situation with high inflation, tight food supplies and the escalation of inter-communal violence, mainly in Greater Darfur and Greater Kordofan regions and in Blue Nile State.

Poor rains severely affected 2022 main season harvests and livestock in Somalia, Kenya and Ethiopia

In central and southern parts of the subregion, namely **Burundi**, **Rwanda**, southeastern **Kenya**, central and southern **Somalia**, the **United Republic of Tanzania**, southern **South Sudan** and **Uganda** (excluding the Karamoja Region), harvesting of the 2022 first season cereal crops was recently completed. The March–May seasonal rains have been poor, especially in **Somalia**, northern and eastern **Kenya**, and southern **Ethiopia**. In the key growing areas of southern Somalia and in southeastern and coastal marginal agriculture areas of Kenya, dry conditions prevailed during most of the season, resulting in widespread germination failures and crop wilting. Production of the 2022 “Gu” season cereal crops in Somalia is expected to be 50 percent below average, with an almost complete failure of crops where famine has been projected to occur in Bay Region, and the maize output in southeastern marginal agricultural areas of Kenya is officially estimated to be over 40 percent below the average. In pastoral and agropastoral areas of southern **Ethiopia**, central and northern **Somalia**, and northern and eastern **Kenya**, dry weather conditions hampered the regeneration of rangeland and water resources, resulting in widespread animal deaths.

Seasonal rains were poor elsewhere, but rainfall deficits, and hence cereal production shortfalls, were less substantial. The outputs of the “Masika” and “Msimu” harvests in **the United Republic of Tanzania** and of the first season harvests in southern **South Sudan** and **Uganda** are all estimated at below-average levels. By contrast, adequate rains in **Rwanda**

Table 9. East Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
East Africa	6.2	6.2	6.1	45.9	44.2	44.0	56.4	55.5	55.0	-0.9
Ethiopia ²	5.1	5.2	5.0	22.8	22.7	21.6	28.1	28.2	26.8	-4.9
Kenya	0.3	0.3	0.3	4.0	3.7	3.7	4.4	4.1	4.2	+2.7
Uganda	0.0	0.0	0.0	3.3	3.2	3.2	3.5	3.4	3.4	+0.3
United Republic of Tanzania	0.1	0.1	0.1	7.5	8.1	7.0	11.1	12.2	10.9	-11.1

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

¹ Total cereals includes wheat, coarse grains and rice (paddy).

² Official production estimates for Ethiopia by the Ethiopian Statistics Service from 2020 onwards do not include Tigray Region.

and **Burundi** resulted in good harvests from the "2022B" season crop.

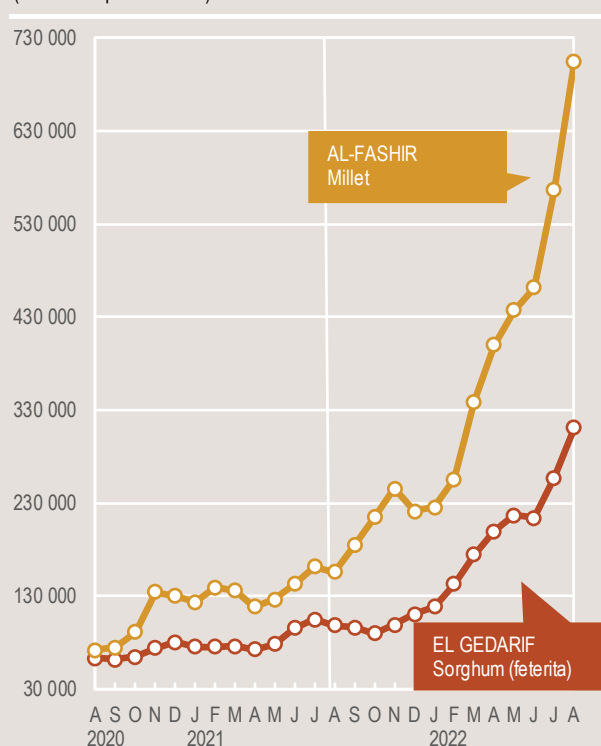
In northern parts of the subregion, including central and western **Kenya**, the northeastern Karamoja Region in **Uganda**, **Ethiopia**, **Eritrea**, the **Sudan** and central and northern **South Sudan**, production prospects of the main season cereal crops, for harvest from October, are mixed. In the **Sudan**, below-average rains in June and July delayed sowing operations, reducing the planted area and adversely affecting crop establishment. Torrential rains in late July and August 2022 improved vegetation conditions, but triggered floods that resulted in localized crop losses. In northern and central unimodal rainfall areas of **South Sudan**, the rainy season had a timely onset, except in northern Unity and Upper Nile states where rains established in June, with a one-month delay, affecting planting operations. Since the start of the season, cumulative rains have been above average, bolstering yield prospects, but also exacerbating floods due to river overflows in central and northern areas. Increased incidences of organized violence at the subnational level continued to disrupt agricultural operations, especially in Upper Nile and Warrap states. In **Ethiopia**, above-average June–September seasonal rains have benefited vegetation conditions and boosted yield expectations in

key producing areas of the western highlands. In Tigray Region and in neighbouring areas of Amhara Region affected by the conflict, despite a shortage of inputs, a larger number of households were reported to be engaged in agricultural activities compared to the previous year, due to an improved security situation following the ceasefire in late March. However, the resumption of fighting in late August 2022 has caused serious concerns about the outcome of the cropping season. In **Eritrea**, cereal production prospects are favourable as the 2020 "Kiremti" rains (June–September) have been characterized by above-average amounts and an even spatial and temporal distribution. In the key growing areas of Rift Valley and Western provinces of **Kenya**, maize production is officially forecast at 15 to 20 percent below average due to a delayed onset of seasonal rains and prolonged dry spells during critical growth stages that affected both planted area and yields. Crop production is expected at below-average levels also in the agropastoral Karamoja Region of **Uganda** owing to prolonged dry spells.

Prices of coarse grains at exceptionally high levels

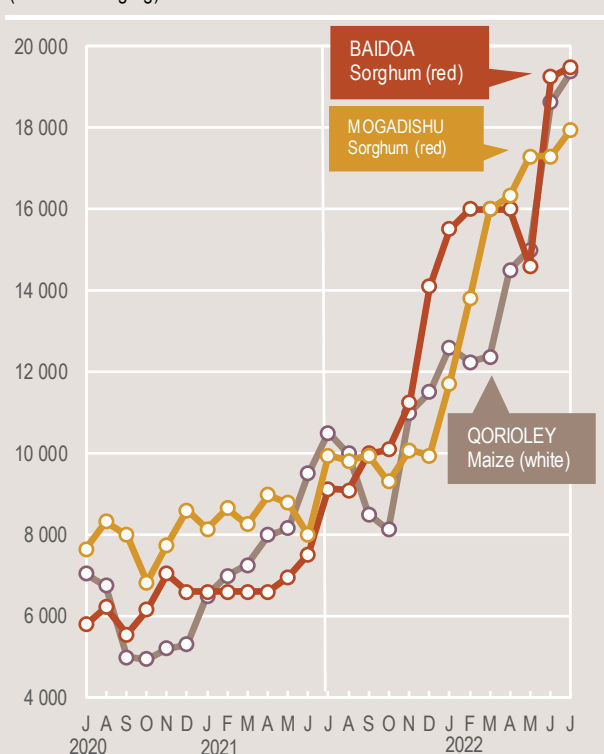
In **Somalia**, prices of maize and sorghum in July 2022 were at near-record to record levels in most markets, including the capital, Mogadishu. In Baidoa, one of the two districts where famine is expected, prices of sorghum soared by more than 30 percent between May and July 2022, reaching record highs, as seasonal patterns were compounded by expectations of a dismal performance of the cropping season. In **South Sudan's** capital, Juba, prices of sorghum and maize surged

Wholesale prices of selected cereals in the Sudan
(Sudanese pound/tonne)



Source: Food Security information for Action (SIFSA).

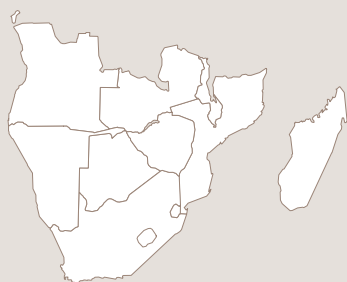
Retail prices of maize and sorghum in Somalia
(Somali shilling/kg)



Source: Food Security Analysis Unit.

by about 50 percent between June and August 2022, mainly due to a significant depreciation of the national currency on the parallel market. Prices of coarse grains in August 2022 were at record levels, mainly due to a protracted difficult macroeconomic situation, low domestic supplies and high insecurity disrupting trade flows. In the **Sudan**, prices of domestically produced sorghum and millet have increased steadily since early 2022, mainly due to a fast stock depletion following the below-average 2021 harvest and a continual depreciation of the national currency that has pushed up production and distribution costs. In August 2022, prices increased by up to 35 percent due to concerns over the performance of the 2022 harvest and to an increase in custom duties which inflated fuel and transportation costs. Prices of coarse grains in August 2022 were at record levels, underpinned by tight supplies, the continuous depreciation of the national currency and soaring prices of agricultural inputs that increased production costs. Similarly, in **Ethiopia**, prices of locally produced maize increased since early 2022 and were about 40 percent higher than their year-earlier levels, mainly due to the depreciation of the national currency. In Ethiopia and the Sudan, prices of wheat are at near-record to record levels, reflecting the elevated international prices.

SOUTHERN AFRICA



Favourable rainfall forecast boosts 2023 cereal production prospects

Planting of the 2023 cereal crops is anticipated to begin in October 2022 and, similar to the preceding year, weather forecasts indicate a higher-than-normal probability of above-average rainfall amounts across most areas of the subregion between October 2022 and March 2023. Some delay in sowing operations may occur in northern **Zambia**, northern **Malawi** and northern **Mozambique**, where rainfall amounts in the first half of this period are forecast at below-average levels. In addition, the weather outlook for **Madagascar** points to a higher-than-normal likelihood of below-average rainfall during the entire rainy season, which could prolong dry weather conditions in southern regions, increasing the risk of a successive year with a reduced cereal harvest. Notwithstanding the areas with less favourable rainfall forecasts, the overall weather outlook supports preliminary expectations that aggregate subregional cereal production in 2023 could remain at an average to above-average level. However, the elevated prices of fertilizers and other inputs, including fuel, present a downside risk to production. Although the large majority of farmers are not likely to make notable reductions in the planted area to cereals,

in part reflecting the prevailing high grain prices, a reduction in fertilizer use could affect yields in 2023.

Above-average 2022 aggregate cereal outturn

The aggregate cereal output for the subregion is pegged at 37.3 million tonnes in 2022, moderately above the five-year average and about 11 percent less than the record high of 2021. Despite the above-average aggregate outturn, significant production downturns were registered in **Zambia** and **Zimbabwe**, with harvests at below-average levels, largely on account of an unfavourable distribution of rainfall. Above-average cereal outturns were estimated in **Madagascar**, **Malawi** and **South Africa**, where weather conditions in the main producing areas were broadly conducive for crop production. Elsewhere in the subregion, harvests were close to the five-year averages.

Ample stocks limit import needs in 2022/23

Despite the year-on-year decrease in domestic cereal production in 2022, import requirements are forecast to grow only moderately in the 2022/23 marketing year (generally April/March) as most countries are expected to draw down on their large stocks built up from the bumper harvests in 2020 and 2021, amid the elevated global grain prices. Total cereal import requirements in 2022/23 are forecast at a slightly above-average level of 8.8 million tonnes, which mostly consists of wheat, rice and maize.

The subregion is a net importer of wheat and import requirements are estimated at 3.9 million tonnes in 2022/23, moderately below the previous five-year average. Reflecting the disruptions to exports from

the Black Sea region, South Africa, the largest importer of wheat in the subregion, has received shipments only from the European Union, Australia and the Americas in the 2021/22 wheat marketing year (October/September). This is in contrast to the previous year, when about 15 percent of the total wheat imports were sourced from the Russian Federation as well as a smaller amount from Ukraine. While the subregion may face some supply constraints to fully meet its wheat import needs on account of effects of the war in Ukraine, wheat and wheat products account for only a small proportion of households' calorie intake and, therefore, the food security impact of the prevailing high global prices and potential supply disruptions is likely to be limited. Import needs for maize and rice are expected to be fully met, with most maize imports foreseen to be sourced from within the subregion, primarily from South Africa.

Cereal prices at elevated levels, reaching record highs in some countries

Prices of cereals remained at elevated levels and in some cases at record highs, owing to lower year-on-year domestic outputs, currency depreciations and the still high global prices, despite recent declines in international benchmark prices. In **South Africa**, owing in part to the recent decrease in global cereal prices, wholesale prices of maize and wheat declined between May and August 2022, but at their latest levels were more around 25 percent higher year on year. In **Botswana**, **Eswatini** and **Namibia**, net importers of cereals, prices of wheat flour continued to increase in June and July, reaching new record levels, largely as a result of the still elevated global prices. As of July, maize meal prices were only slightly higher year on year reflecting the

Table 10. Southern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
Southern Africa	2.3	2.9	2.8	29.9	34.0	29.4	4.3	4.9	5.1	36.5	41.8	37.3	-10.9
excl. South Africa	0.4	0.6	0.5	14.2	16.5	13.3	4.3	4.9	5.1	19.0	22.0	18.9	-14.1
Madagascar	0.0	0.0	0.0	0.2	0.2	0.2	3.8	4.3	4.5	4.0	4.6	4.7	+3.6
Malawi	0.0	0.0	0.0	3.7	4.7	3.9	0.1	0.1	0.1	3.9	4.9	4.0	-17.9
South Africa	1.9	2.3	2.3	15.7	17.6	16.1	0.0	0.0	0.0	17.6	19.9	18.4	-7.2
Zambia	0.2	0.2	0.2	3.1	3.7	2.8	0.0	0.1	0.1	3.3	4.0	3.0	-22.9
Zimbabwe	0.2	0.3	0.2	1.9	3.1	1.8	0.0	0.0	0.0	2.1	3.4	2.0	-42.3

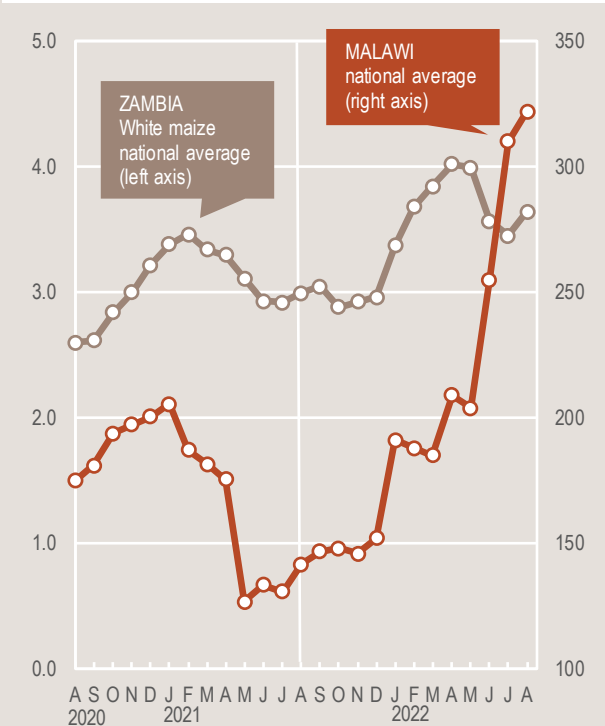
Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017-2021 period.

fact that maize is produced in relatively large volumes in these countries, unlike wheat, and this helps to partly buffer domestic prices from external market dynamics. In **Zambia**, although prices

of food have increased sharply in 2022, the annual food inflation rate slowed to 11 percent in August 2022, down from 32 percent in August 2021. The deceleration partly reflects the appreciation

intensifying the spill over effects of the high global food prices.

Maize prices in selected Southern African markets
(Zambian kwacha/kg) (Malawi kwacha/kg)



Sources: Central Statistical Office, Zambia; Ministry of Agriculture and Food Security, Malawi.

of the national currency against the United States dollar, which has tempered import inflationary pressure. Conversely, in **Malawi**, the devaluation of the national currency earlier in the year has exerted strong inflationary pressure and, combined with a reduced cereal harvest in 2022, the national average price of maize grain increased steeply in June and July to a level just below the all-time high of 2020. In **Zimbabwe**, although the monthly official food inflation rate slowed to 14 percent in August 2022, down from 29 percent in the previous month, prices of food were 353 percent higher year on year, the country has experienced triple-digit inflation rates since April. The high rate of inflation is largely the result of a weak currency that is

Worsening food insecurity in 2022/23

The prevalence of acute food insecurity during the peak lean period, between January and March 2023, is expected to increase compared to the 22 million people estimated to have needed humanitarian assistance in the same period in 2022 (estimates taken from IPC analysis and, where not available, from national government assessments). The reduced cereal harvests and high prices of food commodities are expected to be the primary drivers of acute food insecurity. The slowdown in economic growth that is foreseen in most countries is likely to have an adverse impact on income-earning opportunities and could result in further erosions to households’ purchasing power. Governments are expected to face fiscal challenges and increasing expenditure needs for social protection programmes to respond to the high inflation rates. These challenges could hinder the implementation of large-scale agricultural input subsidy programmes, with implications for cereal production in 2023, particularly for small-scale farmers. The highest levels of acute food insecurity are expected in **Madagascar, Malawi and Zimbabwe** as well as in southern provinces of **Angola**.

REGIONAL REVIEWS

ASIA



Countries with unfavourable cereal production prospects in 2022*

Sri Lanka: Shortages and high prices of agricultural inputs

*/** See Terminology (page 7).

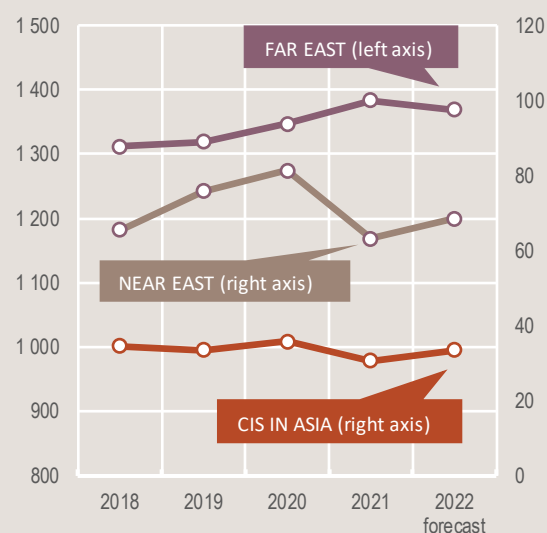
Dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties.

Source: GIEWS, 2022. *Crop Prospects and Food Situation #3* [online]. [Cited 30 September 2022], modified to comply with the United Nations map No. 4140 Rev. 4, 2011.

Production Overview

Forecast at 1 471 million tonnes, the aggregate 2022 cereal output in Asia is 2.2 percent above the five-year average but slightly lower on a yearly basis. This forecast is mostly underpinned by sizeable production upturns in the Far East subregion, reflecting robust growth in the leading cereal producers China (mainland) and India, which more than compensated for the reduced harvests in several countries, notably Sri Lanka. Poorly distributed rains curbed harvests in the Near East subregion and most countries are expected to register average or below-average harvests, except in Türkiye, where conducive weather conditions helped lift production above the five-year average. Persisting difficult economic conditions in Afghanistan and the Syrian Arab Republic were factors that constrained farmers' ability to access sufficient agricultural inputs and was a further contributing factor to the low harvests. In CIS Asia, mostly beneficial weather conditions supported a near-average cereal production in 2022.

Cereal production (million tonnes)



FAR EAST



Cereal output in 2022 forecast at above-average level

In most Northern Hemisphere countries, the 2022 main crops, mostly rice and coarse grains, are approaching the harvest stage. The 2022/23 secondary crops will be planted towards the end of the year following the completion of the main harvest. In countries along the south of the Equator, including Indonesia, Sri Lanka, Timor-Leste and Viet Nam, harvesting of the main 2022 crop finalized in the first part of the year and farmers are currently engaged in cropping activities for the secondary or third seasons.

The 2022 subregional aggregate cereal output is forecast at 1 369 million tonnes (rice in paddy equivalent), slightly above the previous five-year average. The 2022 main season output is forecast at average to above-average levels reflecting adequate rains in cereal producing areas of most countries. However, mainly as a result of constrained access to agricultural inputs,

below-average outputs are expected in **the Democratic People's Republic of Korea, Nepal, Myanmar** and especially in **Sri Lanka**, where a recent joint [FAO/WFP Crop and Food Security Assessment Mission \(CFSAM\)](#) assessed that the 2022 aggregate cereal production would be 42 percent down year on year and the lowest level since the 2017 drought-affected output. In **Pakistan**, there are concerns that the 2022 agricultural production could be below average, following severe monsoon floods that caused significant losses to “Kharif” standing crops, including rice, sorghum and millet. Severe losses of cash crops, such as sugarcane and cotton as well as vegetables and orchards, were also reported.

Production of paddy, the major food staple in the subregion, is forecast at 690 million tonnes, down 2 percent from the 2021 record, but still an above-average result. Although some of these countries are anticipated to harvest less than in 2021, production in **Bangladesh, China (mainland), Cambodia, India, and Thailand** is still expected to remain at an above-average level in 2022. In **Viet Nam** and **Malaysia**, production is expected to remain near or slightly below the previous five-year average. By contrast, paddy production is forecast below the average in **the Democratic People's Republic of Korea, Nepal, Myanmar** and **Sri Lanka**, mainly due to limited availability and high prices of agricultural inputs as well as in **Bhutan, Indonesia, Japan** and **the Republic of Korea**.

The 2022 subregional production of coarse grains, mostly maize, is forecast at 403 million tonnes, 5 percent above the five-year average, mostly driven by area expansions in response to remunerative prices of the maize crop and strong demand by the local feed industry. Bumper outputs are forecast in **Bangladesh, China (mainland), India, Indonesia, Thailand** and **the Philippines**. By contrast, maize production is forecast at a below-average level in **Viet Nam** due to low plantings, as farmers shifted to alternative and more profitable crops.

The 2022 wheat harvest finalized in June and, based on official data, the subregion's output is estimated at an above-average level of 276.1 million tonnes.

Cereal imports forecast well above the average in 2022/23

At subregional level, cereal import requirements in the 2022/23 marketing year are forecast at 170.2 million tonnes (rice in milled terms), about 12 percent above the average. The high level mostly reflects the strong demand for feed crops, especially in **China (mainland), Thailand** and **the Republic of Korea** driven primarily by the growth of the livestock sector. Subregional wheat imports are forecast at 57.5 million tonnes, 6 percent above the average, underpinned by large import forecasts for **China (mainland), Bangladesh, Malaysia** and **the Philippines**. In **Pakistan**, traditionally a wheat exporting country, wheat imports

Table 11. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
Far East	268.4	278.9	276.1	382.6	401.0	402.8	683.0	703.5	690.1	1 334.0	1 383.4	1 369.0	-1.0
Bangladesh	1.1	1.1	1.2	3.7	4.7	4.8	54.9	56.8	56.4	59.7	62.6	62.4	-0.3
Cambodia	0.0	0.0	0.0	1.0	0.7	0.7	11.1	11.7	11.5	12.1	12.4	12.2	-2.1
China (mainland)	134.1	136.9	138.4	271.6	283.1	285.3	211.8	212.8	213.3	617.5	632.8	637.0	+0.7
India	103.9	109.6	106.8	48.1	51.2	51.1	180.8	195.4	187.0	332.8	356.2	344.9	-3.2
Japan	1.0	1.1	0.9	0.2	0.3	0.2	10.6	10.5	10.3	11.8	11.9	11.5	-3.6
Myanmar	0.1	0.1	0.1	2.7	3.2	3.2	25.9	25.0	24.2	28.7	28.3	27.5	-3.1
Nepal	2.0	2.1	2.0	3.1	3.1	3.0	5.4	5.1	5.2	10.5	10.3	10.2	-0.7
Pakistan	25.7	27.3	26.1	8.3	10.0	9.4	11.9	14.0	13.2	46.0	51.3	48.7	-5.0
Philippines	0.0	0.0	0.0	8.0	8.2	8.3	19.3	20.0	20.1	27.3	28.2	28.4	+0.8
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.1	5.2	5.1	5.3	5.4	5.3	-2.0
Sri Lanka	0.0	0.0	0.0	0.3	0.5	0.2	4.2	5.1	3.1	4.5	5.6	3.3	-41.9
Thailand	0.0	0.0	0.0	4.9	5.0	5.4	31.8	33.2	32.8	36.7	38.2	38.2	+0.1
Viet Nam	0.0	0.0	0.0	4.7	4.4	4.4	43.4	43.9	42.8	48.1	48.3	47.2	-2.3

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017-2021 period.

are forecast to reach at least 2.3 million tonnes, an above-average level, as the government and traders aim to boost domestic supplies.

In the 2022 calendar year, imports of rice are forecast at nearly 17 million tonnes, while exports are forecast at 46.9 million tonnes.

Domestic prices of wheat and wheat flour at record highs in August 2022

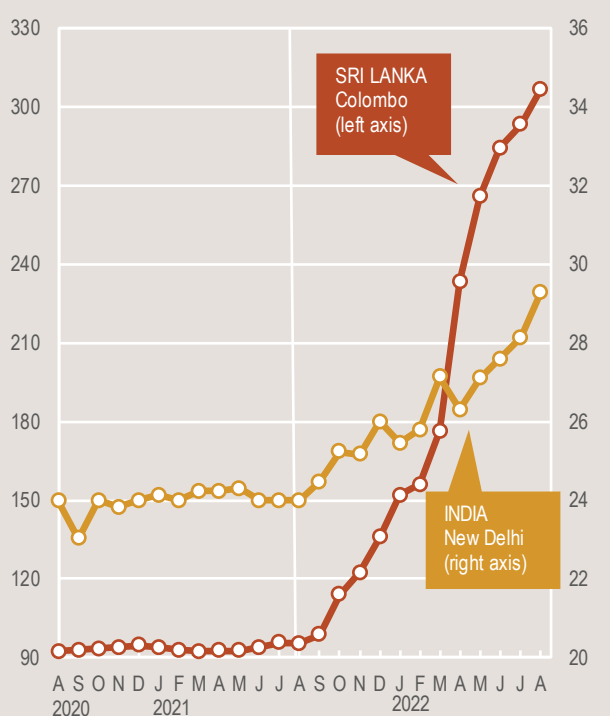
Prices of wheat and wheat flour increased between June and August 2022, reaching record or near-record levels in most importing countries due to a series of factors, including elevated international prices, currency depreciations and increased transportation

and production costs. Price increases were particularly strong in **Sri Lanka** where domestic wheat flour prices, as well as most other food items, were at elevated levels in August 2022, associated with tight market availabilities, after severe macroeconomic challenges caused major decreases to agricultural production and had a negative impact on the country's capacity

Wheat flour retail prices in selected Far East countries

(Sri Lanka rupee/kg)

(Indian rupee/kg)

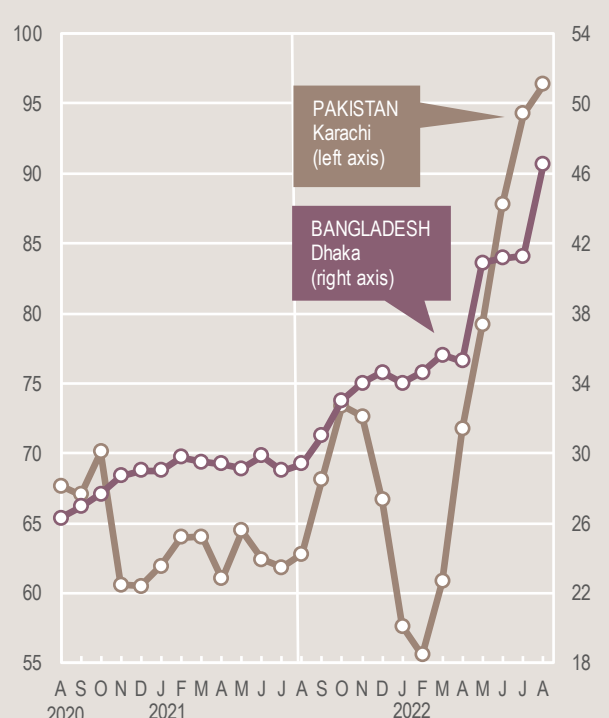


Sources: Ministry of Consumer Affairs, India; Department of Census and Statistics, Sri Lanka.

Wheat flour retail prices in selected Far East countries

(Pakistan rupee/kg)

(Taka/kg)



Sources: Bureau of Statistics, Pakistan; Management Information System and Monitoring, Bangladesh.

Table 12. Far East cereal production and anticipated trade in 2022/23

(thousand tonnes)

	5-yr Avg (2017/18 to 2021/22)	2021/22	2022/23	Change: 2022/23 over 2021/22 (%)	Change: 2022/23 over 5-yr avg (%)
Coarse grains					
Exports	4 816	7 140	6 340	-11.2	+31.6
Imports	82 449	99 674	95 777	-3.9	+16.2
Production	382 568	401 014	402 808	+0.4	+5.3
Rice (milled)					
Exports	40 618	46 195	46 841	+1.4	+15.3
Imports	14 926	18 120	16 977	-6.3	+13.7
Production	454 560	468 461	459 592	-1.9	+1.1
Wheat					
Exports	3 976	9 121	7 125	-21.9	+79.2
Imports	54 334	59 140	57 492	-2.8	+5.8
Production	268 435	278 874	276 120	-1.0	+2.9

Notes: Marketing year July/June for most countries. Rice trade figures are for the second year shown.

to import. Severe fuel shortages disrupted the distribution of food supplies within the country, creating shortages in most markets, adding to the upward pressure on prices. Wheat flour prices also increased sharply and were at record levels in **Bangladesh**, supported by a slowdown in imports, and **Pakistan**, mostly driven by supply disruptions and stock losses due to the recent floods. In most countries, domestic prices of rice were stable or showed slight increases between June and August 2022, except in **Myanmar**, where they rose for the

seventh consecutive month in August 2022, reaching record levels, mostly supported by expectations of a reduced 2022 harvest. In **Sri Lanka**, domestic prices of rice decreased in August 2022 for the first time since October 2021, with the start of the 2022 “Yala” harvest. However, prices remained more than two times higher than their year-earlier levels.

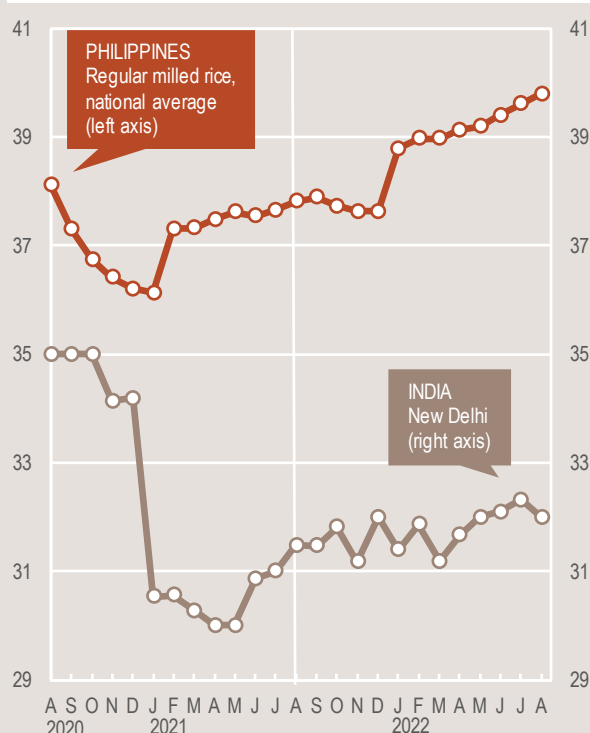
Acute food insecurity increases

The aggregate number of people facing acute food insecurity has increased since early 2022, particularly in countries that rely heavily on food imports considering the high international prices of basic food commodities, such as wheat, vegetable oils and maize. Elevated international and domestic prices of fertilizers and energy have driven up production costs, contributing to higher domestic food prices. The depreciation of the national currencies in many importing countries has made imports costlier, increasing food inflation rates particularly in **Sri Lanka, Mongolia, Pakistan and the Lao People’s Democratic Republic**. Acute food insecurity is expected to worsen in **Pakistan**, following floods and landslides, especially in the southern parts of the country. The floods resulted in deaths and caused the

disruption to livelihoods of 33 million people, with reports indicating widespread damage to housing, crops, livestock assets, as well as critical agricultural infrastructure and households’ food reserves. According to the latest IPC analysis, carried out prior to the floods, 4.7 million people, 25 percent of the population, were estimated to be facing high levels of acute food insecurity, IPC Phase 3 (Crisis) and above, between April and June 2022 in the 25 districts analysed in Balochistan, Sindh and Khyber Pakhtunkhwa provinces. In **Sri Lanka**, according to the recently released CFSAM report, the food and nutrition security has deteriorated since the beginning of 2022, with large numbers of vulnerable households widely adopting food and livelihood-related coping strategies, including cutting the number of meals consumed in a day, reducing meal sizes and purchasing food on credit. In **Bangladesh**, food insecurity remains fragile for about 1 million Rohingya refugees from Myanmar, who reside mostly in the Cox’s Bazar District and the island of Bhasan Char and rely entirely on humanitarian aid, while monsoon floods between May and July affected approximately 7.2 million people. In **Myanmar**, the political crisis following the military takeover in February 2021 continues to compromise the already difficult food security situation of Rohingya’s internally displaced persons. In **the Democratic People’s Republic of Korea**, persisting economic constraints, exacerbated by expectations of a reduced 2022 harvest, may worsen the food insecurity situation, with large numbers of people suffering from low levels of food consumption and very poor dietary diversity.

Rice retail prices in selected Far East countries

(Philippine peso/kg) (Indian rupee/kg)



Sources: Ministry of Consumer Affairs, India; Bureau of Agriculture Statistics, the Philippines.

NEAR EAST



Below-average cereal production forecast in 2022

Harvesting of the 2022 spring wheat, barley and maize crops is ongoing, while the minor rice crop is expected to be harvested from October. The harvest of the main winter cereal crops was completed in July.

Although cumulative rainfall amounts in the 2021/22 crop year would have been sufficient for satisfactory crop development in **the Syrian Arab Republic, Iraq, Afghanistan** and parts of **the Islamic Republic of Iran**, the rainfall distribution was unfavourable. After a promising start of the season with above-average precipitation amounts in late December 2021, rainfall in January and February 2022 was insufficient. Abundant rainfall in March 2022 arrived too late and did not allow crops to recover. Conversely, despite late season dryness from April onwards speeding up crop maturing in central parts of **Türkiye**, overall weather conditions in the country remained favourable.

Total cereal production in 2022 is forecast at 68.5 million tonnes, about 4 percent below the five-year average, but almost 9 percent (5.5 million tonnes) above the previous year's drought-affected output. The foreseen production recovery is mostly accounted for by expected increases in **Türkiye** and **the Islamic Republic of Iran**. In **Türkiye**, total 2022 cereal production

is forecast at 36.9 million tonnes, up 15 percent compared to the previous year and almost 6 percent above the five-year average. In **the Islamic Republic of Iran**, cereal production is forecast to reach 20.3 million tonnes, an increase of 13.5 percent compared to 2021, but still about 4 percent below the average.

The largest year-on-year production decline is reported in **Iraq**, where the 2022 cereal harvest is estimated at 3.4 million tonnes (including 2.7 million tonnes of wheat), almost 35 percent below the near-average harvest in 2021. While drought contributed to the decline, so did the policy decision to halve the area planted with irrigated crops in an effort to reduce water demand amidst increasing water scarcity. The cereal output in **Afghanistan** also declined, estimated at 4.6 million tonnes, about 4 percent below the previous year's harvest and 12 percent below average. In **the Syrian Arab Republic**, the cereal outturn is estimated at 1.5 million tonnes, up 6 percent on the drought-affected 2021 harvest, but representing only 50 percent of the five-year average. Across the countries affected by conflict and/or facing difficult economic conditions, including **Afghanistan, the Syrian Arab Republic, Yemen** and **Lebanon**, farmers' ability to purchase inputs remained constrained.

The subregional cereal import requirement in the 2022/23 (July/June) marketing year is forecast at 75.8 million tonnes, close to the five-year average and about 5 percent below the previous year's level. The wheat import requirement is forecast at 36.1 million tonnes, about 12 percent above the average, reflecting rising demand due to population growth and declining domestic production. Although the expected production decline would warrant a larger increase in cereal import requirements, stocks in a number of countries are estimated at adequate levels

as many countries stepped up their imports following the start of the war in Ukraine in an effort to safeguard availability on the domestic markets despite the elevated global commodity prices.

Initial concerns about the ripple effects of the war in Ukraine on the cereal availability in the subregion have not materialized, as exports from the Russian Federation continued and countries sought to diversify their import sources. However, elevated global food commodity prices, coupled with depreciations of the national currencies vis-à-vis United States dollar, are increasing the food import bill.

Large number of people remain food insecure

Lingering conflicts, high international commodity prices, economic downturns and reduced livelihood opportunities continue to have a significant impact on food security conditions in many countries.

In **Afghanistan**, according to the latest IPC analysis, 18.9 million people are projected to face IPC Phase 3 (Crisis) or above between June and November 2022. Compared to the peak food insecurity period between November 2021 and March 2022, the population facing IPC Phase 3 (Crisis) or above has declined slightly, mainly due to the efforts in scaling up humanitarian assistance to reach an estimated 40 percent of the population.

In **Yemen**, the acute food insecurity and malnutrition situation has deteriorated in 2022, with 17.4 million people in IPC Phase 3 (Crisis) and above in need of assistance between January and May, projected to increase to 19 million people until the end of the year. Of greatest concern are the 31 000 people facing IPC Phase 5 (Catastrophe) that were expected to rise to

Table 13. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
Near East	44.0	38.2	41.1	21.6	19.7	22.9	5.4	5.1	4.5	71.0	63.1	68.5	+8.7
Afghanistan	4.4	3.9	3.8	0.3	0.3	0.3	0.6	0.6	0.5	5.2	4.8	4.6	-4.2
Iran (Islamic Republic of)	13.5	10.4	13.0	3.9	4.3	4.3	3.5	3.1	3.0	21.0	17.9	20.3	+13.5
Iraq	4.0	4.2	2.7	1.1	0.6	0.7	0.0	0.4	0.0	5.5	5.2	3.4	-34.6
Türkiye	19.7	17.7	19.5	14.1	13.3	16.4	1.0	1.0	1.0	34.8	32.0	36.9	+15.3

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017-2021 period.

161 000 by June. A new IPC analysis is being conducted and, given slight improvements in funding for humanitarian operations and improvements in the security environment, the outlook in food insecurity is expected to be less dire than projected earlier in the year.

No systematic IPC-type assessments have been recently conducted in **the Syrian Arab Republic** and **Lebanon**. The latest estimates for **the Syrian Arab Republic**, conducted following the WFP's Consolidated Approach for Reporting Indicators of Food Security (CARI) methodology, put the number of people facing acute food insecurity to about 12 million in June 2021, a slight decline compared to 2020. In **Lebanon**, according to WFP surveys conducted in September and December 2021, almost 1.8 million Lebanese citizens (46 percent of the total population) and 735 000 Syrian refugees (49 percent of the total Syrian refugee population) were estimated to be acutely food insecure in 2021. However, in both countries, the ongoing economic challenges have continued to erode the purchasing power of the population, with negative consequences on the overall food security situation.

CIS IN ASIA



Cereal production in 2022 projected at a near-average level

Harvesting of the 2022 winter cereals was completed in August, while spring cereals, which account for approximately 70 percent of the annual grain output, are still being harvested. The total 2022 subregional³ cereal output is expected at a near-average level of 33.4 million tonnes. In **Kazakhstan**, weather conditions have been overall favourable between May and August 2022, and the 2022 spring crops (mainly wheat and barley) are in good conditions. The 2022 wheat output (including the recently harvested minor winter crop) is forecast at a near-average level of 13.2 million tonnes. By contrast, production of barley is expected to

reach only 3 million tonnes, about 13 percent below the five-year average level reflecting a gradual decline in plantings in recent years.

The 2022 wheat output is forecast slightly below the five-year average in **Turkmenistan**, following unfavourable weather conditions during the season in the south-eastern Mary province, as well as in **Armenia** due to a reduction in plantings, which almost halved since 2015, as farmers have gradually switched to more profitable crops. Near-average outputs are forecast in **Azerbaijan**, **Georgia**, **Kyrgyzstan**, **Tajikistan** and **Uzbekistan**.

Near-average wheat exports from Kazakhstan in 2022/23

In the 2022/23 marketing year (July/June), total subregional import requirements of cereals, mainly wheat, are forecast at a near-average level of 9.1 million tonnes. Robust import demand for wheat from **Armenia** and **Turkmenistan**, reflecting reduced domestic wheat harvests, is seen to outweigh reduced import needs from **Azerbaijan** and **Uzbekistan**. Total cereals exports from **Kazakhstan** are forecast at

Table 14. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
CIS in Asia	23.8	21.4	23.7	8.9	8.0	8.6	33.9	30.6	33.4	+9.3
Armenia	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.3	+64.7
Azerbaijan	2.0	1.9	2.0	1.3	1.5	1.3	3.3	3.4	3.3	-1.4
Georgia	0.1	0.1	0.1	0.3	0.3	0.3	0.4	0.4	0.4	-13.4
Kazakhstan	13.3	11.8	13.2	4.8	3.8	4.3	18.5	16.2	18.0	+11.6
Kyrgyzstan	0.6	0.4	0.6	1.1	0.8	1.1	1.7	1.3	1.7	+38.5
Tajikistan	0.8	0.9	0.8	0.4	0.4	0.4	1.3	1.4	1.3	-8.1
Turkmenistan	1.1	0.9	1.1	0.1	0.1	0.1	1.3	1.1	1.3	+17.9
Uzbekistan	5.8	5.4	5.8	1.0	1.0	1.0	7.1	6.7	7.1	+6.0

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017-2021 period.

¹ Total cereals includes wheat, coarse grains and rice (paddy).

³ Georgia is no longer a member of CIS but its inclusion in this group is maintained for the time being.

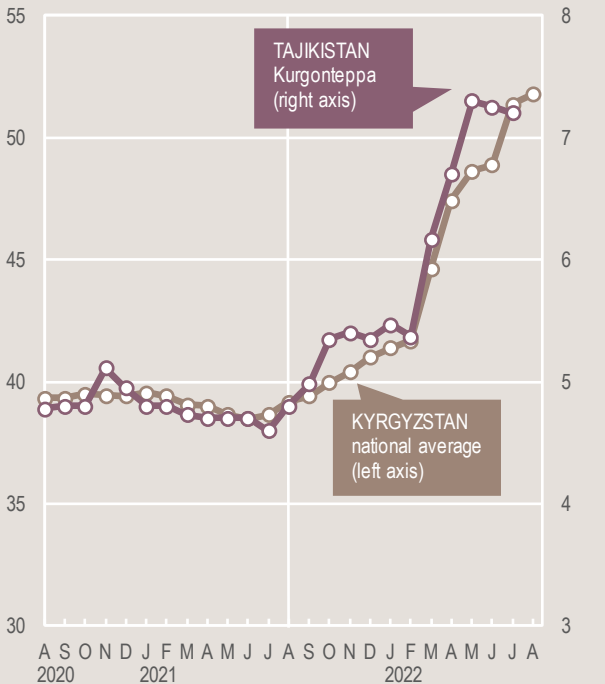
8.8 million tonnes, 6 percent below the average volume. Wheat exports are forecast at a near-average level of 8 million tonnes, underpinned by the favourable output expected in 2022 and the steady demand by importing countries. By contrast, barley exports are projected at 600 000 tonnes, well below the average volume.

Domestic prices of wheat flour continue to increase

In importing countries of the subregion, domestic retail prices of wheat continued to increase in the third quarter of 2022, mostly supported by high international export quotations and strong consumer demand, amid

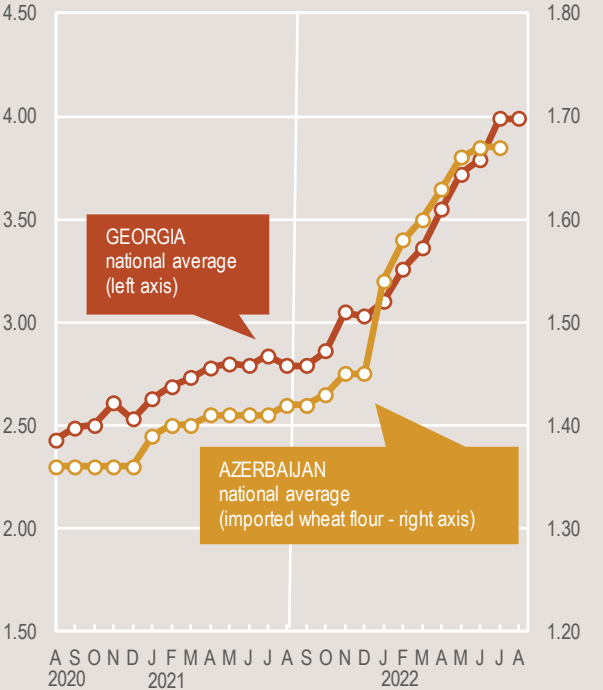
fears of supply shortages. Prices of wheat flour increased sharply from February to August 2022 in **Georgia** and **Kyrgyzstan**, and until July in **Azerbaijan** and **Tajikistan** (latest available data). In all countries, prices reached levels well above those in the corresponding month a year earlier.

Retail wheat flour prices in selected CIS in Asia countries
(Som/kg) (Somoni/kg)



Sources: National Statistical Committee of the Kyrgyz Republic; Statistical Agency under the President of the Republic of Tajikistan.

Retail wheat flour prices in selected CIS in Asia countries
(Lari/kg) (Azerbaijani manat/kg)



Sources: National Statistics Office of Georgia; State Statistical Committee of the Republic of Azerbaijan.

REGIONAL REVIEWS

LATIN AMERICA AND THE CARIBBEAN



** See Terminology (page 7).

A dispute exists between the governments of Argentina and the United Kingdom of Great Britain and Northern Ireland concerning sovereignty over the Falkland Islands (Malvinas).

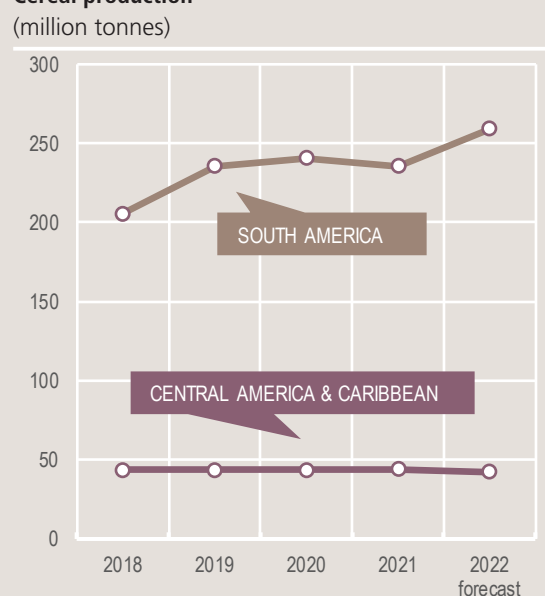
Source: GIEWS, 2022. *Crop Prospects and Food Situation #3* [online]. [Cited 30 September 2022], modified to comply with the United Nations map No. 4170 Rev. 19, 2022.

Production Overview

Total cereal production in Latin America and the Caribbean is forecast at an all-time high of 301.7 million tonnes in 2022, 11 percent above the five-year average. The expected outturn mostly rests on substantial coarse grain harvests in South America owing to large maize acreages. Prospects for the 2022 wheat crop, grown in the winter months, are more uncertain as prevailing dry conditions could lower yields. However, based on a large estimated planted area, production in 2022 is still forecast to exceed the five-year average.

In Central America, a slightly below-average cereal output is forecast in Mexico, the leading producer, on account of a low maize acreage. Elsewhere in Central America and the Caribbean, current prospects point to near-average 2022 outturns. However, an above-average hurricane season is still active, heightening the risk of damages to the second season crops.

Cereal production



CENTRAL AMERICA AND THE CARIBBEAN



Wheat production anticipated to be above average in 2022

In **Mexico**, harvesting of the 2022 main wheat crop, which accounts for about 95 percent of the subregional output, was completed in July. The main season output is officially estimated at 3.6 million tonnes, well above the five-year average due to excellent yields and above-average plantings, especially in the key producing state of Sonora. Sowing of the rainfed 2022 minor wheat crop concluded in August and the area planted is estimated to be slightly below average on account of dry weather conditions between May and July. Overall, the aggregate subregional wheat output in 2022 is forecast at an above-average level of 3.6 million tonnes.

Below-average maize production forecast in 2022

The 2022 subregional maize output is forecast at a below-average level of 30 million tonnes. In **Mexico**, the largest cereal producer in Central America, the main maize crop is at flowering and grain filling stages. Production prospects are generally unfavourable due to prolonged dry weather conditions between May and July in central and eastern areas, which resulted in below-average sowings and reduced yield expectations. Forecasts indicate a higher-than-normal chance of

average precipitation in September and October, and if this materializes, it could prevent a further worsening of yield prospects. The total maize outturn in Mexico, including a reduced harvest from the minor season crop, is expected at a below-average level of 25.5 million tonnes in 2022.

Elsewhere in the subregion, harvesting of the 2022 main season maize crop is ongoing and the aggregate subregional output is forecast at a near-average level reflecting broadly conducive weather conditions. In **Honduras** and **Guatemala**, favourable weather conditions are anticipated to offset the negative effects of a contraction in plantings and a reduced application of fertilizers, resulting in average outputs. Production is anticipated at a slightly above-average level in **Nicaragua** and **El Salvador**, where the government distributed cost-free seeds and fertilizers that prevented a previously anticipated decrease in plantings. Planting of the minor season maize crop started in early September across the subregion and production prospects are favourable, resting on forecasts of average to above-average rainfall amounts between October and December.

In **the Dominican Republic**, the 2022 second season paddy harvest is ongoing and satellite imagery depicts above-average vegetation conditions in the major cropping areas, except in the northwestern region where rainfall amounts were below-average between April and July. This dryness also resulted in a below-average area sown with the second season crop, which normally represents about half of the annual output. Tropical storm Fiona, of Category 1, made landfall in the eastern region on

19 September 2022 and brought torrential rains and strong winds. While assessments of its impact on agricultural production are ongoing, it may not significantly reduce paddy production at the national level, as the eastern region is a minor rice producer. Overall, the national paddy output is expected to be slightly above average in 2022, owing to a good first season output. In **Haiti**, the 2022 second minor maize and main rice crops are currently at vegetative to flowering stages and their conditions are mostly favourable, as a result of higher rainfall amounts since mid-August 2022. National cereal production in 2022, including the dry weather-affected main season crop and the minor third season crop, is preliminarily forecast at a below-average level, owing to a low aggregate acreage and reduced yields, as farmers struggled to access agricultural inputs, amid reduced availabilities and elevated prices.

The Atlantic hurricane season, which normally lasts until November, is forecast to be above average and excessive moisture levels could curb yield potentials, especially for beans, while storm damage may also result in crop losses.

Cereal imports forecast slightly above average in 2022/23

In the 2022/23 marketing year (September/August), cereal import requirements are forecast at 37.4 million tonnes, slightly above the five-year average, driven by the strong demand for yellow maize by the feed industry. Wheat imports, which have been generally on the rise since 2010 in line with the increasing population, are expected to be near the average, amid high international prices that are foreseen to dampen demand.

Table 15. Central America and the Caribbean cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
Central America and the Caribbean	3.2	3.3	3.6	37.9	37.7	36.0	2.9	2.8	2.8	43.9	43.8	42.4	-3.2
El Salvador	0.0	0.0	0.0	0.9	1.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	-3.8
Guatemala	0.0	0.0	0.0	2.0	2.0	2.0	0.0	0.0	0.0	2.0	2.0	2.0	+0.1
Honduras	0.0	0.0	0.0	0.7	0.6	0.7	0.1	0.1	0.0	0.7	0.7	0.7	+2.9
Mexico	3.2	3.3	3.6	33.0	32.9	31.2	0.3	0.3	0.3	36.5	36.4	35.1	-3.7
Nicaragua	0.0	0.0	0.0	0.5	0.4	0.5	0.4	0.4	0.4	0.8	0.9	0.8	-1.2

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017-2021 period.

Despite recent declines, prices of maize and beans higher on a yearly basis

After sustained increases during the first seven months of 2022, wholesale prices of white maize declined in August 2022 in **Guatemala**, **Honduras** and **Nicaragua**, with the early start of the main season harvest in some areas. Additional downward pressure was provided by large import volumes in the second quarter of 2022 in Guatemala and Honduras, and by favourable production prospects in Nicaragua. By contrast, white maize prices rose between July and August 2022 in Sinaloa and Puebla states in **Mexico**, owing to concerns over the impact of dry weather conditions on crops, and in **El Salvador**. Overall, white maize prices were higher year on year in August 2022, supported by high production and transportation costs.

On account of increased availability from the ongoing harvests and good production prospects, prices of red beans declined in August 2022 in **El Salvador**,

Honduras and **Nicaragua**, following an upward trend in the previous months. Prices of black beans strengthened between July and August in **Guatemala** and **Mexico**. In the latter country, delayed planting operations of the main season crop, due to severe soil moisture deficits between May and July, contributed to the uptick in prices.

In the **Dominican Republic**, retail prices of rice remained stable during the first eight months of 2022, reflecting adequate supplies from the above-average 2021 production. In **Haiti**, price movements of domestically produced maize meal varied across the country during June and July, while prices of black beans rose in most markets on account of a delayed start of the harvest. The continuous depreciation of the national currency has put upward pressure on prices of imported food items, including rice, wheat flour and cooking oil. In addition, heightened violence continued to hamper market activities and limited access to food and fuel, especially in the capital, Port-au-Prince.

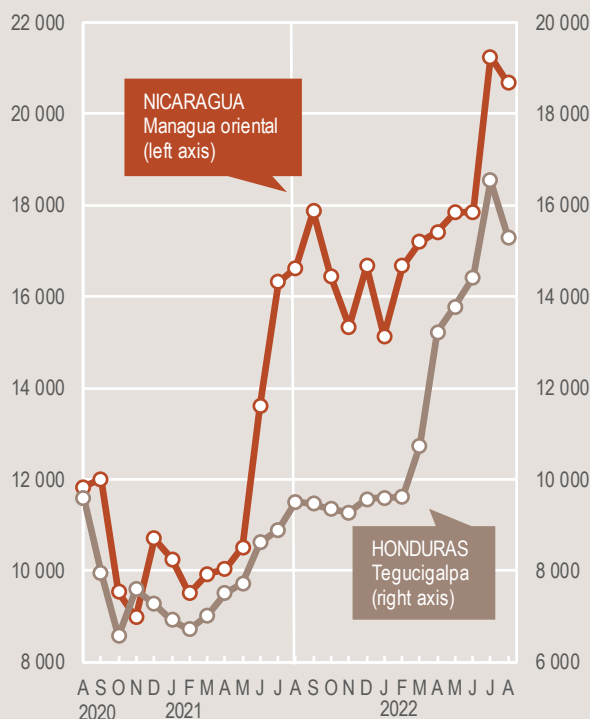
Food insecurity expected to deteriorate in Guatemala

In **Guatemala**, according to the latest IPC analysis, the number of acutely food insecure people is forecast to reach 3.2 million between October 2022 and February 2023, up from 2.5 million in the September 2021 to January 2022 period. The expected deterioration is primarily due to high prices of food and fuel, which have eroded households' purchasing power. In addition, the increase of agricultural production costs in Guatemala could result in reduced demand for casual labourers who rely on daily wages for their livelihoods and this may further impact households' ability to access foods. In **Haiti**, heightened insecurity has curtailed food and fuel supplies and affected access to markets and essential services, exacerbating an already fragile food security situation. While food security assessments are currently ongoing in other countries, the high food prices are likely to reduce households' purchasing power, worsening access to food across the subregion.

Wholesale white maize prices in selected Central America countries

(Córdoba/tonne)

(Honduran lempira/tonne)

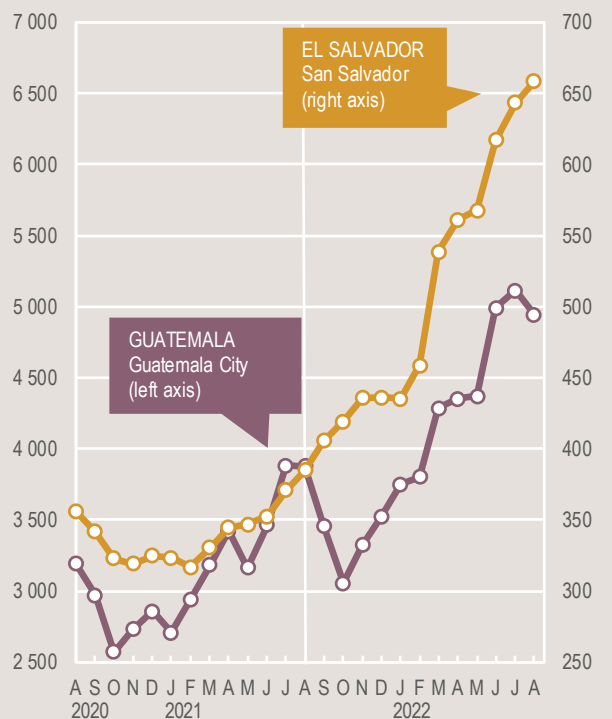


Sources: Secretaría de agricultura y ganadería, Honduras; Ministerio agropecuario y forestal, Nicaragua.

Wholesale white maize prices in selected Central America countries

(Quetzal/tonne)

(US dollar/tonne)



Sources: Ministerio de agricultura, ganadería y alimentación, Guatemala; Dirección general de economía agropecuaria, El Salvador.

SOUTH AMERICA



Large planted area underpins an above-average maize production in 2022

In South America, harvesting of the 2022 main season maize crop is underway in most countries and the subregional maize output is forecast at nearly 187 million tonnes in 2022, 16 percent above the five-year average, primarily due to large plantings. In **Brazil**, where maize sowings have been increasing sharply since 2019, underpinned by high prices and strong demand, the upward trend continued in 2022 and an all-time high area was estimated in 2022. As a result, and with yields foreseen to slightly exceed the five-year average, total maize production is forecast at a record-high level of 115 million tonnes in 2022. Despite below-average yields of the early-planted crops, maize production in **Argentina** is officially anticipated at an above-average level of 59 million tonnes, mainly due to record-high plantings. Similarly, in

Colombia, Peru and **Uruguay**, maize outputs are forecast at above-average levels, resting on an expansion of plantings and favourable weather conditions that pushed up yields to average levels. In **Paraguay**, harvesting is about to start in July, a month later than normal due to severe moisture deficits earlier in the season that delayed planting operations. Although abundant rains between March and May supported the development of the main season crops, yields are forecast at average levels as cold snaps in the first half of June affected grain maturation. Overall, aggregate maize production, including the weather-affected minor season crop, is preliminarily forecast to be near average in 2022. An average outturn is also expected in **Ecuador**, while maize production in **Bolivia (Plurinational State of)** is anticipated to be below average, reflecting reduced yields owing to unfavourable weather conditions. Maize production in **Chile** is expected at a record-low level as prolonged dryness between October 2021 and March 2022 resulted in a sharp contraction of both the planted area and yields.

Harvesting of the 2022 paddy crop concluded in southern parts of the subregion. In **Brazil**, production is officially estimated at 10.8 million tonnes, 7 percent below the average. The decline reflects the impact of earlier dry weather conditions in the key producing states, which reduced the sown area and adversely affected yields. By contrast, in **Uruguay**, a bumper harvest

is estimated, reflecting above-average plantings and high yields. In **Colombia** and **Peru**, where the 2022 first season harvest was recently completed, a below-average outturn is foreseen on account of a reduced area, owing to low prices in 2021.

Forecasts of below-average rains dampen yield prospects for 2022 wheat crop

Planting of the 2022 wheat crop is ongoing in most of countries. In **Argentina**, the leading producer of the subregion, below-average rainfall amounts between May and mid-June delayed planting operations and curbed an expansion of the planted area, officially forecast at a near-average level of 6.45 million hectares. Expectations on persistent dry weather conditions in the coming months raise concerns about crop germination and development. Large plantings were also initially anticipated in **Brazil, Paraguay** and **Uruguay**, due to high crop prices. However, production prospects are uncertain as weather forecasts point to below-average rainfall amounts in the July–October period over key producing areas in centraleastern Argentina, southern Brazil, southeastern Paraguay and western Uruguay, which are likely to contain yield potentials.

Cereal exports forecast at near-record levels in 2022/23

Aggregate cereal exports in the 2022/23 marketing year (March/February)

Table 16. South America cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2021 estim.	2022 fcast	5-yr Avg.	2021 estim.	2022 fcast	5-yr Avg.	2021 estim.	2022 fcast	5-yr Avg.	2021 estim.	2022 fcast	Change: 2022/2021 (%)
South America	28.8	33.1	32.2	174.6	177.0	203.7	24.9	25.5	23.4	228.4	235.7	259.3	+10.0
Argentina	19.5	22.1	19.5	61.2	70.0	68.2	1.3	1.5	1.2	82.0	93.5	88.9	-4.9
Brazil	5.8	7.7	9.2	97.1	90.8	119.4	11.6	11.8	10.8	114.4	110.2	139.4	+26.5
Chile	1.3	1.1	1.2	1.7	1.6	1.5	0.2	0.1	0.1	3.2	2.8	2.7	-4.5
Colombia	0.0	0.0	0.0	1.4	1.5	1.5	2.8	2.9	2.7	4.2	4.4	4.2	-4.8
Peru	0.2	0.2	0.2	1.8	1.9	1.8	3.3	3.5	3.0	5.3	5.5	5.0	-10.1

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017-2021 period.

are forecast at a near-record level of 106 million tonnes, reflecting expectations of bumper 2022 maize outputs, in combination with strong export demand. Subregional exports of maize, the major exportable grain, are forecast at a well above-average level of almost 80 million tonnes in 2022/23. Exports of wheat in 2021/22 (December/November) are also expected at high levels. In **Argentina**, exports of wheat reached historic highs in the first quarter of 2022, with sales to African countries nearly tripling compared to the same period in 2021, amid reduced exports from Ukraine.

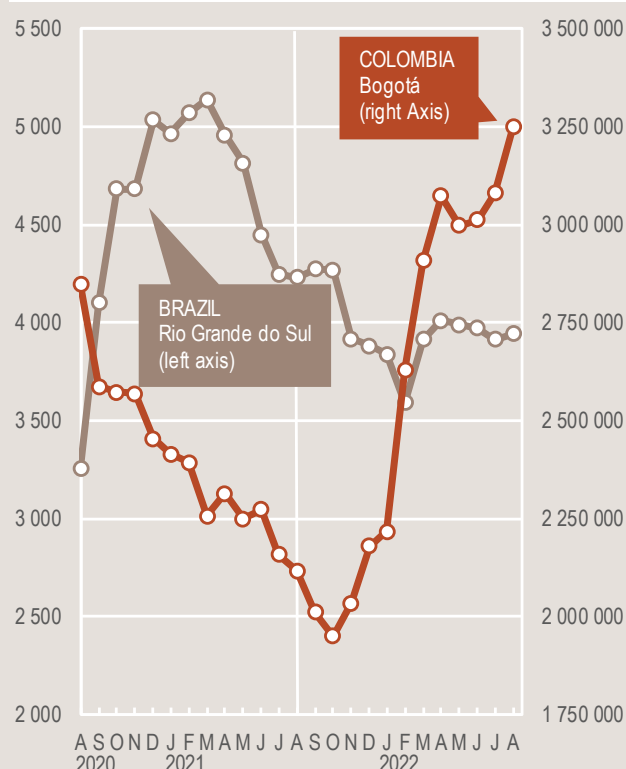
Wheat prices rose sharply

Domestic prices of wheat increased between March and May following trends in the international market. Price gains were exacerbated by record high exports during the first four months of 2022 in **Argentina** and by lower year-on-year import levels during the same period in **Chile**. In both countries, prices were at least 90 percent up on a yearly basis as of May. Prices also rose in **Brazil**, due to increases in export prices of Argentina, the country's main wheat supplier. In **Uruguay**, after an uptick in

March, prices remained stable but more than 45 percent higher year on year on account of large exports between January and April 2022. In the importing countries of **Bolivia (Plurinational State of)**, **Colombia**, **Ecuador** and **Peru**, prices of wheat flour rose sharply in the March–May period, underpinned by international price trends.

Despite the ongoing harvests, prices of yellow maize increased between March and May in **Argentina** and **Uruguay**. As of May, Argentinian yellow maize prices were 50 percent higher compared to a year earlier, reflecting the impact of strong export demand, and in Uruguay,

Wholesale rice prices in selected countries in South America
(Brazilian real/tonne) (Colombian peso/tonne)



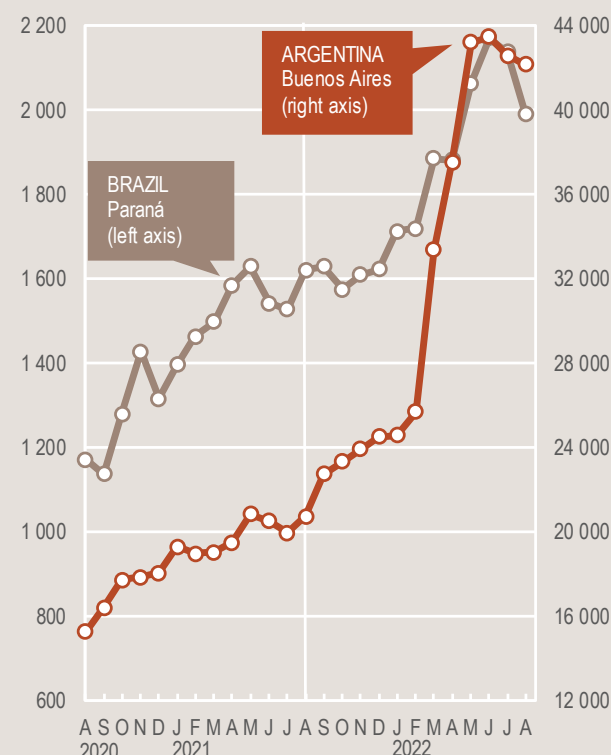
Sources: Departamento administrativo nacional de estadística (DANE), Colombia; Instituto de economía agrícola, Brazil.

Wholesale maize prices in selected countries in South America
(Brazilian real/tonne) (Argentine peso/tonne)



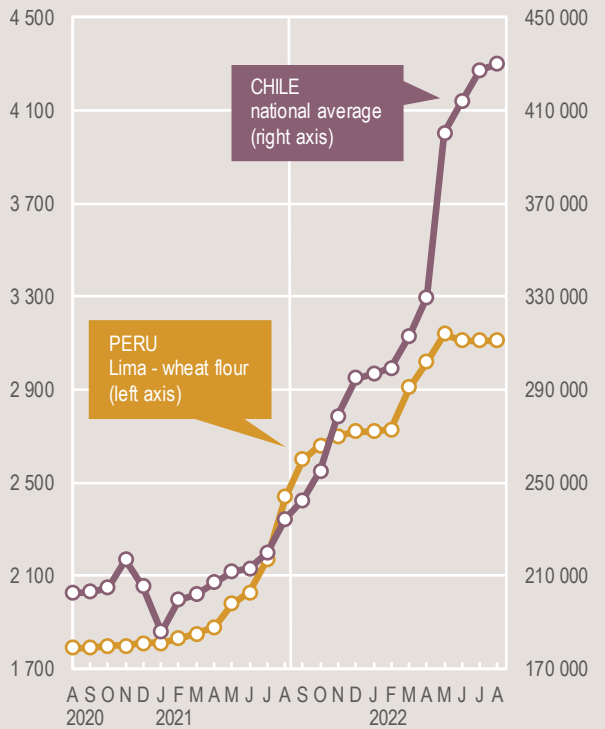
Sources: Instituto de economía agrícola, Brazil; Bolsa de cereales, Argentina.

Wholesale wheat prices in selected countries in South America
(Brazilian real/tonne) (Argentine peso/tonne)



Sources: Instituto de economía agrícola, Brazil; Bolsa de cereales, Argentina.

Wholesale wheat prices in selected countries in South America
(Nuevo sol/tonne) (Chilean peso/tonne)



Sources: Ministerio de Agricultura y Riego, Peru; Cotrisa, Chile.

prices were 10 percent higher year on year, with elevated production costs contributing to these higher levels. Prices also increased in **Colombia**, as lower imports during the first quarter of 2022 and high international prices exerted upward pressure. By contrast, in **Brazil**, prices declined seasonally in the March–May period and were near year-earlier values. In **Chile**, maize prices were stable in April and May as the downward pressure from the 2022 harvest was limited by high import costs and expectations of a well below-average output.

With regard to rice, prices increased in the March–May period in most countries, despite the arrival of the 2022 harvests.

High number of Venezuelan refugees and migrants in need of food assistance

The number of refugees and migrants from **Venezuela (Bolivarian Republic of)** was estimated at 6.1 million as of June 2022, as a result of the severe and prolonged macroeconomic crisis. The largest populations are in neighbouring countries of Colombia (1.8 million), Peru (1.3 million), Ecuador (0.5 million), Chile (0.4 million) and Brazil (0.3 million). The remaining 0.8 million people are spread across other countries in Latin America and the Caribbean, with about 1 million people located outside of the subregion. According to the Regional Interagency Coordination Platform for Refugees and Migrants of Venezuela (R4V), the number of Venezuelans (with intention to remain in the host countries) in need of food assistance is forecast at 3.5 million in 2022 and over 80 percent of them is located in Colombia, Peru and Ecuador. The rising food inflation in host countries is likely to exacerbate households' vulnerability and limit their access to food.

REGIONAL REVIEWS

NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of early September 2022
Territories/boundaries**



** See Terminology (page 7)

Source: GIEWS, 2022. *Crop Prospects and Food Situation #3* [online]. [Cited 30 September 2022], modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

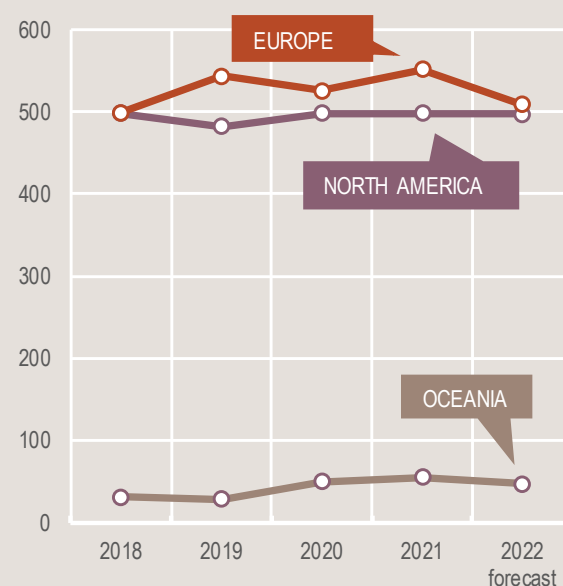
Production Overview

In the United States of America, the total 2022 cereal output is forecast below the five-year average, reflecting the adverse impact of rainfall deficits on the winter wheat crop and a cutback in maize plantings triggered by high inputs costs. In Canada, cereal production is forecast to rebound from the drought-reduced 2021 level, largely driven by a larger wheat output.

In the European Union, prolonged periods of low rainfall amounts have curbed yields of wheat and maize crops, and aggregate cereal production is therefore forecast to decline to a below-average level in 2022.

In Oceania, a third consecutive above-average wheat harvest is forecast in Australia in 2022, owing to a high level of plantings, while coarse grains production is also forecast to be above average.

Cereal production
(million tonnes)



NORTH AMERICA



Unfavourable weather conditions curb 2022 cereal production in the United States of America

In **the United States of America**, total cereal production in 2022 is forecast at 433.4 million tonnes, 1 percent below the five-year average. Wheat production is forecast at 48.5 million tonnes, moderately lower than the five-year average, but 8 percent up on the previous year's output. The year-on-year increase reflects an expected upturn in spring wheat production, with the crop currently being harvested, which is anticipated to more than offset a reduced winter wheat harvest due to dry weather conditions. Coarse grains production is also pegged at a slightly below-average level of 376.9 million tonnes, largely underpinned by a cutback in maize plantings, as pressure from high input costs encouraged farmers to plant alternative less input-intensive crops, such as soybeans. Yields are foreseen to remain at near-average levels.

In **Canada**, cereal production is expected to recover strongly in 2022 from the drought-affected output in 2021 and the total outturn is forecast at an above-average level of 63.7 million tonnes. The favourable

outlook mostly reflects an expected upturn in wheat production, pegged at 34.5 million tonnes, about 13 percent above the five-year average. The increase is predominantly driven by a price-induced expansion in sowings, while yield prospects are also favourable. Production of coarse grains is forecast at 29.2 million tonnes, about 8 percent above the average.

EUROPE



EUROPEAN UNION

Drought conditions curtail cereal yields in the European Union

In **the European Union**, where harvesting of the 2022 cereal crops is expected to conclude in November, the aggregate cereal outturn is forecast at 277.4 million tonnes, nearly 9 percent below the five-year average. The poor outlook primarily reflects prolonged periods of low rainfall amounts and higher-than-average temperatures that have impaired yield prospects. Outputs of both wheat and coarse grain crops are foreseen at below-average levels.

Wheat production in **the United Kingdom of Great Britain and Northern Ireland** is forecast at 14.3 million tonnes in 2022, almost double the five-year average, supported by

an increase in planted area that is foreseen to compensate for a decline in yields.

CIS IN EUROPE

Below-average subregional cereal output expected in 2022 due to a reduced production forecast in Ukraine

Harvesting of the 2022 winter cereals (mainly wheat) was completed in August 2022, while harvesting of spring crops is ongoing and is expected to finalize in November. The aggregate 2022 subregional cereal output is forecast at 193.7 million tonnes, about 4 percent below the five-year average. The outlook mainly rests on the expectation of a reduced cereal outturn in **Ukraine**, largely the result of a sharp contraction in the area harvested, as the war has constrained access to fields, caused labour shortages and a decline in economic resources. Despite generally favourable weather condition, yields are also foreseen at below-average levels due to delayed or missed application of fertilizers. The subregional production of wheat (winter and spring crops) is forecast at a near-average level of 110 million tonnes as a bumper output in **the Russian Federation** is expected to be offset by below-average harvests in **Ukraine**, as well as in **the Republic of Moldova**, where dry weather conditions during the season negatively affected yields. Aggregate 2022 maize and barley outputs in the subregion are forecast at 44.2 million tonnes and 26.7 million tonnes, respectively, well below the five-year average levels mainly due to lower outputs anticipated in **Ukraine**.

Table 17. North America, Europe and Oceania cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	5-yr Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
North America	79.6	66.4	83.0	406.1	423.4	406.0	9.1	8.7	8.0	494.9	498.5	497.1	-0.3
Canada	30.4	21.7	34.5	27.1	24.3	29.2	0.0	0.0	0.0	57.5	45.9	63.7	+38.6
United States of America	49.2	44.8	48.5	379.0	399.1	376.9	9.1	8.7	8.0	437.3	452.6	433.4	-4.2
Europe	261.1	270.3	260.9	264.0	277.2	244.3	4.0	3.8	3.2	529.0	551.3	508.5	-7.8
Belarus	2.4	2.5	2.5	4.8	4.8	4.9	0.0	0.0	0.0	7.2	7.3	7.4	+0.2
European Union ¹	142.2	139.0	132.1	158.2	157.5	143.0	2.8	2.6	2.3	303.3	299.1	277.4	-7.3
Russian Federation	78.9	76.1	86.5	41.3	40.4	42.6	1.1	1.1	0.9	121.3	117.6	130.0	+10.6
Serbia	2.8	3.4	2.8	7.1	6.8	7.2	0.0	0.0	0.0	9.9	10.2	10.0	-2.2
Ukraine	27.2	32.2	20.0	43.8	53.4	33.1	0.1	0.0	0.0	71.0	85.6	53.1	-38.0
Oceania	25.0	36.8	30.8	14.6	18.1	16.2	0.4	0.5	0.6	40.0	55.3	47.6	-14.0
Australia	24.5	36.3	30.3	14.0	17.5	15.6	0.4	0.5	0.6	39.0	54.3	46.5	-14.3

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017-2021 period.

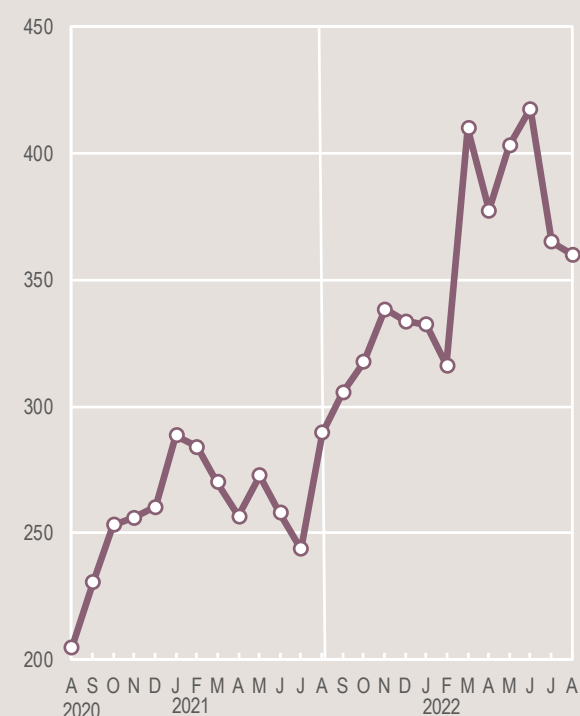
¹ Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

Subregional cereal exports expected well below average in 2022/23

Aggregate cereal exports in the 2022/23 marketing year (July/June) are forecast at 77 million tonnes, almost 20 percent below the five-year average volume, reflecting reduced sales from **Ukraine** and **the Republic of Moldova**. Subregional wheat and maize exports in 2022/23 are anticipated at below-average levels of 48 million tonnes and 22 million tonnes, respectively.

In **Ukraine**, since the start of the war in late February until July, agricultural commodities were mostly transported by rail and river, amid the closure of Black Sea ports. These routes have a much lower capacity compared to sea freight

Wheat export prices in the Russian Federation (US dollar/tonne)



Source: International Grains Council.

and incur logistical challenges, partially caused by different railway gauges used in Ukraine and neighbouring countries. With the reopening of some Ukrainian marine ports in August 2022, grain exports have increased, although so far remaining below the average pre-war levels. As of mid-September, Ukrainian maize and wheat exports in 2022/23 are tentatively forecast at 17 million tonnes and 10 million tonnes, respectively, 31 and 45 percent below the five-year average levels.

Russian export prices of wheat well above year earlier levels

In **the Russian Federation**, export prices of milling wheat rose by 11 percent between April and June 2022, mirroring global commodity price trends. The increase was mainly due to concerns over global exportable supplies, reflecting the impact of hot and dry weather conditions in some of the main producing countries and the effects of the war in Ukraine. Prices declined by about 14 percent in the following two months with the start of the spring wheat harvest and reflecting favourable national production prospects. However, in August 2022 prices were still 24 percent higher on a yearly basis.

In **Belarus**, following the partial removal of price controls that had been introduced in February 2021, the national average retail price of wheat flour increased steeply between April and June 2022, but levelled off in July. The depreciation of the national currency, which lost over

30 percent of its value against the United States dollar compared to July 2021, has been a further contributing factor to the price increases, with wheat flour prices 20 percent higher year on year in July.

About 17.7 million people in need of humanitarian assistance and protection in Ukraine

According to the [August Update](#) of the Ukraine Flash Appeal 2022 issued by the United Nations, about 17.7 million people are estimated to be in urgent need of humanitarian assistance and protection. This is an increase of 2 million people compared to the April figure, and results from the intensification of fighting and hostilities across the frontline since May. About 6.6 million people were displaced in the country as of July 2022 ([IOM](#)), while an estimated 7.28 million Ukrainian refugees had been recorded in European countries as of 13 September 2022 ([UNHCR](#)).

OCEANIA



Production outlook points to second successive bumper harvest in Australia

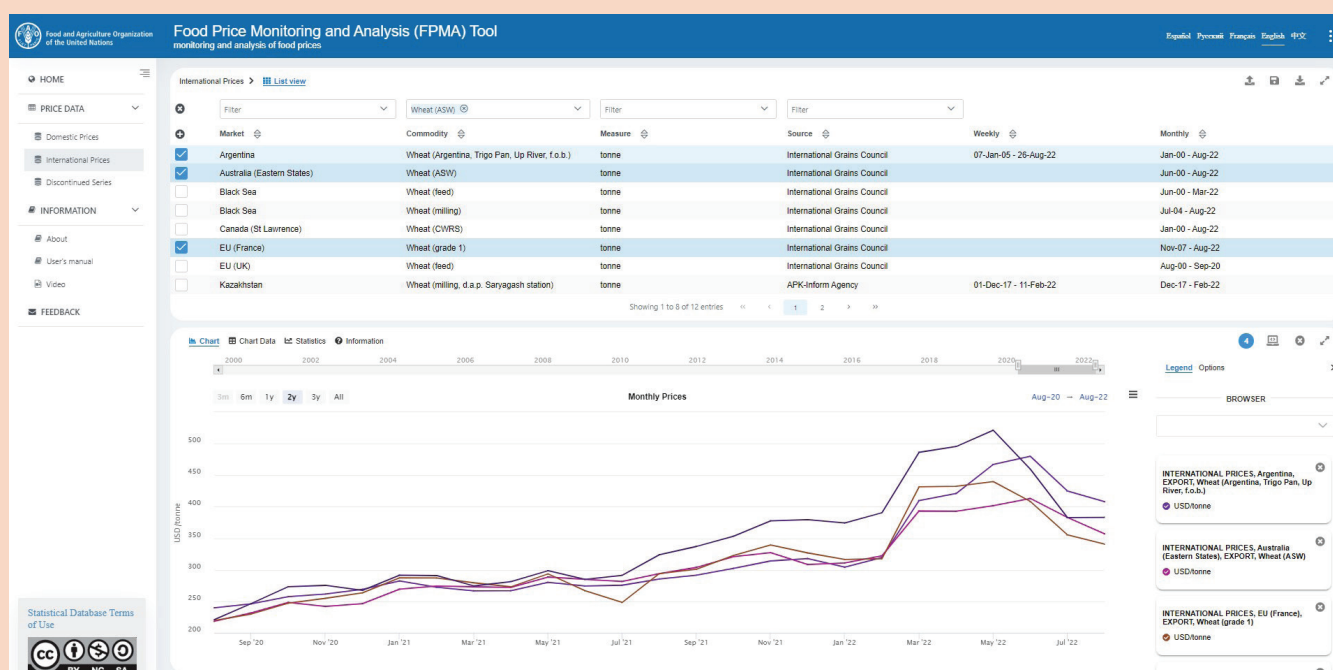
In **Australia**, the 2022 wheat crop is to be harvested in the last quarter of the year and production is expected to be the second largest on record, following the all-time high outturn in 2021. Prospects of above-average wheat yields mostly underlie the production outlook. Production of barley and sorghum are also anticipated to remain above their five-year averages, supported by expectations of an above-average area and yields.

IN FOCUS - Updated version of the Food Price Monitoring & Analysis (FPMA) Tool

FAO Global Information and Early Warning System on Food and Agriculture (GIEWS) has launched a new version of the [Food Price Monitoring and Analysis \(FPMA\) Tool](#). The new version brings the tool up to date with the latest web technologies, making it more performant with an ever-growing dataset (see an introductory video [here](#)).

The FPMA Tool is a web-based application for analyzing and disseminating food price data. The FAO GIEWS' global version - covering **1 881 selected domestic food price series** in **97 countries** and **84 international commodity quotations**¹ - is updated continuously with the latest available data, providing the international community and decision makers with timely food price information.

The FPMA Tool is also available for countries or regional institutions wishing to have their own versions to strengthen country and regional level market information systems to support evidence-based decisions.



¹ As of September 2022.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	Average 2017/18 - 2021/22	2018/19	2019/20	2020/21	2021/22	2022/23
Ratio of world stocks to utilization (%)						
Wheat	37.8	36.7	37.2	37.8	38.4	38.0
Coarse grains	24.9	25.4	24.0	23.4	24.7	22.8
Rice	36.7	37.2	36.6	36.8	37.7	36.2
Total cereals	30.7	30.7	30.0	29.9	30.9	29.5
Ratio of major cereal exporters' supplies to market requirements (%)¹						
	118.5	118.9	119.6	115.5	114.9	114.3
Ratio of major exporters' stocks to their total disappearance (%)²						
Wheat	17.4	18.1	15.5	15.5	17.1	17.5
Coarse grains	14.1	15.6	14.2	11.6	13.8	13.1
Rice	25.0	22.6	26.1	28.5	29.8	27.6
Total cereals	18.9	18.8	18.6	18.5	20.3	19.4
	Average growth rate 2012-2021	2018	2019	2020	2021	2022
Annual growth in world cereal production (%)						
	2.0	-1.8	2.6	2.3	1.4	-1.4
Annual growth in cereal production in the LIFDCs (%)						
	3.2	1.6	4.3	2.9	4.0	-2.4
		2019	2020	2021	2022*	Change 2022* over 2021*
Selected cereal price indices³						
Wheat		95.3	100.7	132.1	169.7	38.3%
Maize		94.6	100.8	144.8	172.5	19.4%
Rice		101.5	110.2	105.8	106.2	-2.7%

Source: FAO.

Notes: Utilization is defined as the sum of food use, feed and other uses. Cereals refer to wheat, coarse grains and rice; grains refer to wheat and coarse grains (barley, maize, millet, sorghum and cereals NES).

¹ Major wheat exporters are: Argentina, Australia, Canada, the European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America. Major coarse grains exporters are: Argentina, Australia, Brazil, Canada, the European Union, the Russian Federation, Ukraine and the United States of America. Major rice exporters are: India, Pakistan, Thailand, the United States of America and Viet Nam.

² Disappearance is defined as domestic utilization plus exports for any given season.

³ Price indices: The wheat price index is constructed based on the International Grains Council (IGC) wheat price index, rebased to 2014-2016 = 100; The coarse grains price index is constructed based on the IGC price indices for maize and barley and one sorghum export quotation, rebased to 2014-2016 = 100. For rice, data refers to the FAO All Rice Price Index, 2014-2016 = 100, which is based on 21 rice export quotations.

*January-August average.

Table A2. World cereal stocks

(million tonnes)

	2018	2019	2020	2021	2022 estimate	2023 forecast
TOTAL CEREALS	856.9	832.1	826.6	834.8	863.5	845.0
Wheat	289.5	274.1	283.8	292.2	297.1	299.1
held by:						
- main exporters ¹	84.5	71.2	63.2	61.1	66.5	68.6
- others	205.0	202.9	220.6	231.1	230.6	230.5
Coarse grains	390.4	371.7	356.4	350.4	369.7	354.9
held by:						
- main exporters ¹	127.3	128.2	122.1	101.1	119.7	112.9
- others	263.1	243.5	234.3	249.3	250.0	242.0
Rice (milled basis)	177.0	186.2	186.4	192.2	196.7	190.9
held by:						
- main exporters ¹	32.2	39.6	45.8	52.4	57.9	54.0
- others	144.8	146.6	140.6	139.8	138.8	136.9
Developed countries						
Australia	7.3	6.9	5.7	7.1	10.6	8.6
Canada	11.1	9.4	9.5	9.4	6.4	9.2
European Union ²	41.3	41.0	41.6	35.8	44.8	31.0
Japan	6.7	6.5	6.9	7.5	6.9	7.1
Russian Federation	23.7	15.3	13.6	17.5	18.1	23.4
South Africa	5.1	3.6	2.6	3.9	4.6	4.9
Ukraine	8.3	7.7	5.6	5.9	23.6	28.1
United States of America	88.8	91.3	80.7	58.4	60.9	55.1
Developing countries						
Asia						
China (mainland)	401.0	385.6	382.7	392.7	398.9	402.7
India	44.0	52.0	64.3	68.9	68.1	60.7
Indonesia	10.2	11.5	9.1	7.7	8.3	8.4
Iran (Islamic Republic of)	10.6	9.1	9.8	11.5	12.8	12.5
Korea, Republic of	4.1	2.6	2.6	3.0	3.2	3.4
Pakistan	5.4	3.3	1.9	4.2	5.9	5.4
Philippines	4.1	5.5	4.5	4.4	4.6	4.4
Syrian Arab Republic	2.1	2.2	3.2	4.1	2.5	0.9
Türkiye	7.1	6.6	10.1	10.5	8.5	8.9
Africa						
Algeria	5.3	6.6	6.7	6.3	5.4	5.7
Egypt	6.9	5.1	5.2	4.5	3.7	4.0
Ethiopia	5.5	6.2	7.1	7.3	6.9	5.7
Morocco	6.7	7.3	5.8	3.6	5.7	4.5
Nigeria	3.1	2.9	1.5	1.8	2.0	1.9
Tunisia	1.1	1.0	1.2	1.0	1.0	1.1
Central America and the Caribbean						
Mexico	7.7	7.6	7.4	6.9	6.8	5.7
South America						
Argentina	12.3	12.6	12.7	11.0	8.1	8.6
Brazil	20.2	16.9	16.7	17.5	13.5	17.5

Source: FAO.

Notes: Based on official and unofficial estimates. Totals computed from unrounded data. Stocks data are based on an aggregate of carryovers at the end of national crop years and do not represent world stock levels at any point in time.

¹ Major wheat exporters are: Argentina, Australia, Canada, the European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grains exporters are: Argentina, Australia, Brazil, Canada, the European Union, the Russian Federation, Ukraine and the United States of America; major rice exporters are: India, Pakistan, Thailand, the United States of America and Viet Nam.² Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

Table A3. Selected international prices of wheat and coarse grains

(USD/tonne)

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Protein ¹	US Soft Red Winter No.2 ²	Argentina Trigo Pan ³	US No.2 Yellow ²	Argentina ³	US Gulf
Annual (July/June)						
2008/09	270	201	234	188	180	184
2009/10	209	185	224	160	168	167
2010/11	316	289	311	254	260	258
2011/12	300	256	264	281	269	286
2012/13	348	310	336	311	278	304
2013/14	318	265	335	217	219	244
2014/15	266	221	246	173	177	247
2015/16	211	194	208	166	170	192
2016/17	197	170	190	156	172	172
2017/18	230	188	203	159	165	190
2018/19	232	210	233	166	166	183
2019/20	220	219	231	163	163	190
2020/21	269	254	263	220	225	308
2021/22	412	351	371	294	281	345
Monthly						
2020 - August	221	207	240	148	163	218
2020 - September	246	220	246	166	185	244
2020 - October	273	245	257	187	217	275
2020 - November	275	250	259	193	226	284
2020 - December	267	249	269	199	232	292
2021 - January	291	280	282	233	257	324
2021 - February	291	278	272	246	248	341
2021 - March	274	274	267	246	236	343
2021 - April	281	278	267	266	253	367
2021 - May	298	294	280	304	272	398
2021 - June	285	263	274	295	251	389
2021 - July	291	251	276	279	235	355
2021 - August	324	272	285	254	237	327
2021 - September	337	270	291	235	240	296
2021 - October	353	302	302	238	246	298
2021 - November	378	330	314	249	252	306
2021 - December	379	329	318	266	260	317
2022 - January	374	324	304	277	272	324
2022 - February	390	339	312	293	288	344
2022 - March	486	447	412	336	336	404
2022 - April	495	427	420	348	316	402
2022 - May	521	441	467	346	315	389
2022 - June	460	380	480	336	299	373
2022 - July	383	311	425	306	271	325
2022 - August	383	315	408	294	281	318

Sources: International Grains Council (IGC) and United States Department of Agriculture (USDA).

¹ Delivered United States of America f.o.b. Gulf.² Delivered United States of America Gulf.³ Up River f.o.b.

Table A4a. Estimated cereal import requirements of low-income food-deficit countries in 2021/2022
(thousand tonnes)

		2020/21 or 2021	2021/22 or 2022
	Marketing year	Total imports	Total imports
AFRICA		31 830.5	33 400.0
East Africa		12 319.7	14 200.3
Burundi	Jan/Dec	184.0	178.0
Comoros	Jan/Dec	67.6	67.0
Eritrea	Jan/Dec	459.0	459.7
Ethiopia	Jan/Dec	2 015.0	2 050.0
Kenya	Oct/Sept	3 639.0	4 368.6
Rwanda	Jan/Dec	225.0	210.0
Somalia	Aug/Jul	1 005.0	1 050.0
South Sudan	Nov/Oct	715.0	720.0
Sudan	Nov/Oct	2 378.0	3 599.0
Uganda	Jan/Dec	667.1	603.0
United Republic of Tanzania	Jun/May	965.0	895.0
Southern Africa		3 929.6	2 950.2
Lesotho	Apr/Mar	231.8	174.1
Madagascar	Apr/Mar	737.4	915.5
Malawi	Apr/Mar	214.5	157.5
Mozambique	Apr/Mar	1 805.1	1 476.0
Zimbabwe	Apr/Mar	940.8	227.1
West Africa		12 917.3	13 419.3
Coastal Countries		7 552.2	7 860.5
Benin	Jan/Dec	524.9	691.2
Côte d'Ivoire	Jan/Dec	2 486.3	2 442.5
Ghana	Jan/Dec	1 891.1	1 932.2
Guinea	Jan/Dec	1 309.5	1 190.5
Liberia	Jan/Dec	439.2	526.7
Sierra Leone	Jan/Dec	470.1	579.3
Togo	Jan/Dec	431.1	498.1
Sahelian Countries		5 365.1	5 558.8
Burkina Faso	Nov/Oct	821.4	822.9
Chad	Nov/Oct	137.7	172.6
Gambia	Nov/Oct	236.8	347.0
Guinea-Bissau	Nov/Oct	151.6	167.3
Mali	Nov/Oct	582.6	581.0
Mauritania	Nov/Oct	523.8	522.0
Niger	Nov/Oct	607.2	735.0
Senegal	Nov/Oct	2 304.0	2 211.0
Central Africa		2 663.9	2 830.2
Cameroon	Jan/Dec	1 481.0	1 612.0
Congo	Jan/Dec	345.5	260.7
Central African Republic	Jan/Dec	96.0	97.0
Democratic Republic of the Congo	Jan/Dec	719.0	838.5
Sao Tome and Principe	Jan/Dec	22.4	22.0

Source: FAO.

Notes: The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 945 in 2019); for full details see <http://www.fao.org/countryprofiles/lifdc>

Table A4b. Estimated cereal import requirements of low-income food-deficit countries in 2021/2022 or 2022

(thousand tonnes)

		2020/21 or 2021	2021/22 or 2022
	Marketing year	Total imports	Total imports
ASIA		28 823.2	29 256.7
Cis in Asia		5 717.7	5 480.9
Kyrgyzstan	Jul/Jun	633.6	794.9
Tajikistan	Jul/Jun	1 129.8	1 049.0
Uzbekistan	Jul/Jun	3 954.3	3 637.0
Far East		12 641.5	12 579.8
Bangladesh	Jul/Jun	10 533.7	10 449.0
Democratic People's Republic of Korea	Nov/Oct	—*	—*
Nepal	Jul/Jun	2 107.8	2 130.8
Near East		10 464.0	11 196.0
Afghanistan	Jul/Jun	2 754.0	3 774.0
Syrian Arab Republic	Jul/Jun	2 470.0	2 782.0
Yemen	Jan/Dec	5 240.0	4 640.0
CENTRAL AMERICA AND THE CARIBBEAN		1 574.9	1 502.8
Haiti	Jul/Jun	672.7	622.8
Nicaragua	Jul/Jun	902.2	880.0
TOTAL		62 228.6	64 159.5

Source: FAO.

Notes: The low-income food-deficit countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for International Development Association (IDA) assistance (i.e. USD 1 945 in 2019); for full details see <http://www.fao.org/countryprofiles/lifdc>

* Estimates not available.

Table A5. Estimated cereal import requirements of low-income food-deficit countries in 2022/2023

(thousand tonnes)

		2021/22	2022/23
	Marketing year	Total imports	Total import requirements
AFRICA		4 895.2	5 354.2
East Africa		1 945.0	2 115.0
Somalia	Aug/Jul	1 050.0	1 090.0
United Republic of Tanzania	Jun/May	895.0	1 025.0
Southern Africa		2 950.2	3 239.2
Lesotho	Apr/Mar	174.1	245.6
Madagascar	Apr/Mar	915.5	791.0
Malawi	Apr/Mar	157.5	158.5
Mozambique	Apr/Mar	1 476.0	1 706.0
Zimbabwe	Apr/Mar	227.1	338.1
ASIA		24 616.7	23 841.8
CIS in Asia		5 480.9	5 221.0
Kyrgyzstan	Jul/Jun	794.9	667.0
Tajikistan	Jul/Jun	1 049.0	1 202.0
Uzbekistan	Jul/Jun	3 637.0	3 352.0
Far East		12 579.8	12 420.8
Bangladesh	Jul/Jun	10 449.0	10 050.0
Nepal	Jul/Jun	2 130.8	2 370.8
Near East		6 556.0	6 200.0
Afghanistan	Jul/Jun	3 774.0	3 405.0
Syrian Arab Republic	Jul/Jun	2 782.0	2 795.0
CENTRAL AMERICA AND THE CARIBBEAN		1 502.8	1 592.1
Haiti	Jul/Jun	622.8	717.1
Nicaragua	Jul/Jun	880.0	875.0
TOTAL		31 014.7	30 788.1

Source: FAO.

Note: Countries included in this table are only those that have entered the new marketing year. The low-income food-deficit countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for International Development Association (IDA) assistance (i.e. USD 1 945 in 2019); for full details see <http://www.fao.org/countryprofiles/lifdc>

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